EMPOWERING DIGITAL ASSETS

Extensis™

# Portfolio™ 7

# User Guide

Designed for Microsoft® Windows® XP

Built for Mac OS X


Portfolio - [Catalog.fdb - Brochures]
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Catalog
Gallery
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# Contents

# Introducing Portfolio 7

## End the chaos...

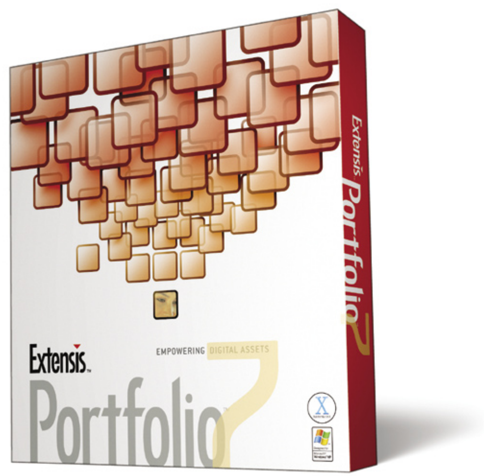
Welcome to Portfolio — a program that takes over the grunt work involved in getting you organized and ends the chaos of naming, tracking, and accessing digital files. Portfolio is designed to help individuals and workgroups keep their files organized, find them quickly when needed, and then distribute them to others via email, CD, DVD, over a network and the Web – with as little effort as possible. The program is designed to work with thousands, or even hundreds of thousands of files at a time, allowing both individual and large workgroups to keep things organized.

## Why do I need Portfolio?

In these days of digital media, it's all too easy for your electronic files to disintegrate into a state of chaos. Without some way of making order out of this chaos, you can end up with some big problems: Pictures get lost. Fonts get separated from the documents they belong in. Wrong versions of images get used. Hours are wasted hunting down documents and copying them from machine to machine.

Portfolio is designed to get that kind of misery out of your life. Here are some of the tasks that Portfolio can help you with:

- *Copy and rename files that you download from your digital camera.*
- *Find digital photos and other image files anywhere on your system by typing only a word or phrase.*
- *Preview an entire CD-ROM of stock photography, without having to insert the CD.*
- *Create a slideshow of your favorite images.*
- *Embed and edit metadata and Portfolio keywords into your images.*
- *Build a web site containing a collection of images.*
- *Collect a set of pictures and burn them directly to CD or DVD from Portfolio.*
- *Access your files with a simple double-click, without having to burrow through multiple folders to find them.*
- *Batch convert and resize images to JPG or TIF file format.*



## How Portfolio Works

It's quick and easy to view and retrieve images in Portfolio catalogs because the catalog stores only thumbnail images of the file — not the full document or image. Portfolio creates pointers to your original files, so the originals are always available for copying to applications, previewing, editing, and so on, while allowing the catalog itself to be fast and efficient.

With Portfolio Server (sold separately) in a workgroup setting, you can allow all users full access to all catalog functions, or you can designate catalog administrators to create, maintain, and control access to catalogs for the entire workgroup.

With Portfolio installed on their computers, and catalogs shared through Portfolio Server, members of your workgroup on both Macintosh and Windows can simultaneously search, view, and use items from catalogs whose source files are located on one or many network servers, shared volumes, CD-ROMs or removable drives.

## Installation

You can find instructions for quick and easy installation on the CD-ROM that is included with your product. If you downloaded an Extensis product installer from our web site, running the installer places an informational Read Me on your hard drive.

*For a complete list of files installed on your computer, and any late breaking changes not included in this guide, see the read me file installed in the Porfolio 7 directory on your computer.*

## System and Software Requirements

To install and use Portfolio, you'll need the following hardware and software:

**Portfolio 7 Macintosh:**

- *Mac OS X (10.2.8 or higher)*
- *Apple Macintosh G3, G4, G5 or higher*
- *256MB of physical RAM*
- *175MB of free hard disk space*
- *QuickTime 6.4 or higher*

**Portfolio 7 Windows:**

- *Windows 2000, Windows XP Home or Professional*
- *Pentium (400MHz or faster recommended)*
- *256MB of physical RAM*
- *75MB of free hard disk space*
- *QuickTime 6.4 or higher*

*For upgrade versions of Portfolio, be sure to have your Portfolio 4, 5 or 6 serial number on hand while installing Portfolio 7.*

## Registration and Personalization

It is important to register your copy of Portfolio so we can provide you with the best possible service. Registered users of Portfolio are eligible for technical support, information regarding new versions and products, discounts and special offers on new products.

Your serial number is located in one of three locations: on the Portfolio CD sleeve, on the product packaging, or was sent to you via email if you purchased through our website. Enter that number to personalize your copy of Portfolio.

If you choose not to personalize your copy, Portfolio runs in a demonstration mode that allows you to use the product for 30 days. You can purchase additional serial numbers from Extensis Customer Service. See the contact page at the beginning of this guide for contact information.

## About this User Guide

This User Guide covers Portfolio 7 for Macintosh and Windows. On a Macintosh, When describing keyboard shortcuts, "Command" refers to the ⌘ key. References to menu selections are shown as Menu > Command.

For more information on specific Portfolio features, refer to the following:

- ***Read Me-located in your Portfolio folder, this text file gives you late-breaking information***
- ***Portfolio page on the Extensis web site:*** *http://www.extensis.com/portfolio/*

## Technical Support

Technical Support is available directly through the Extensis web site. Please fill out the online support form at *http://www.extensis.com/support/* to get support. Our tech support representatives will respond by phone or email, usually within 24 hours on weekdays.

When contacting technical support, include the following information:

- ***Your Portfolio serial number***
- ***Your computer configuration***
- ***Your question or a description of the difficulty you're experiencing - what specifically occurs and when***
- ***Your phone number if you wish to have our representatives call you***

Take note of any displayed error numbers or messages and any other information you think may be relevant.

For answers to frequently asked questions and troubleshooting tips, you can also visit the Portfolio page on the Extensis web site:

*http://www.extensis.com/portfolio/*

# What's New in Portfolio 7?

Portfolio is the industry-leading solution for organizing your digital photos, illustrations, page layouts and presentations into stunning visual catalogs.

Files are only assets if you can locate them when you need them. The powerful new features in Portfolio 7 make it easy to view, organize and repurpose files, turning your files into real assets.

### New user interface

The freshly redesigned user interface makes it easy to organize your files into logical collections of files called galleries. With one click you can view your entire catalog or a predefined subset of files. The new galleries pane allows you to define a specific collections of files, and gives you instant access to those collections.

### Collect and burn to CD

Portfolio 7 is a powerful archiving and publishing tool. It's easy to select a group of items in your catalog and then publish or archive them to CD or DVD.

Discs are burned directly from Portfolio with no additional software required! An image browser can be included on each disc to simplify access to images. As part of the process, Portfolio can also create low resolution preview or proof copies of your files to share with reviewers and clients.

As you archive files to disc, Portfolio automatically remembers the new location of the archived files, so it is easy to locate files on remote disc archives.

### Image conversion

Portfolio can covert cataloged images into JPEG or TIFF file formats, and in the process change the image size, resolution and color mode. Portfolio can also batch convert many images at a time including layered Photoshop files, EPS files and images in camera RAW format.

### Powerful metadata control

Digital cameras and many software programs have the ability to embed important metadata into image files. Portfolio can read and write IPTC and XMP metadata tags, as well as read EXIF tags.

Portfolio specific information, such as keywords, can be embedded directly into your original files as IPTC data. Embedded metadata is available to all other applications that support metadata. By embedding important Portfolio information directly into the original files, you'll never lose the important work you have done in Portfolio.

### Workflow automation

You can configure Portfolio to watch one or many system or network folders. Files within those folders can be automatically cataloged, keywords added and routed to a storage location. Using this background cataloging method you may never need to manually catalog images again!

### Improved screen previews

Portfolio can automatically generate screen-resolution previews as you catalog files. This is a great way to quickly preview files without needing access to the original files. Previews can be up to a maximum of 2000 pixels - twice the size of previews in previous versions of Portfolio.

### Enhanced views

With Portfolio 7 you can customize and save almost every detail of the display in the gallery window. You can creatively define the look of your gallery down to the font and color of each field. These galleries can be printed exactly as you see them on screen. With Portfolio you can have a visually stunning catalog both on screen and on a printed page.

### Contact sheet printing

Choose the number of images per page and Portfolio automatically resizes the images, arranges them on a grid and prints the images onto a contact sheet.

### Web page creation wizard

Rather than just export HTML using a set of predefined templates, Portfolio allows you to build a set of professionally designed webpages. Portfolio is easy enough for the novice, but powerful enough to meet the needs of professional web designers. Choose from wide variety of professionally designed options, or customize the HTML to meet your needs with the Portfolio HTML editor.

### Email low-resolution previews

When you need to share a file with someone, you won't make any friends by sending a huge original file to them by email. With the click of a button, Portfolio quickly resizes the file and attaches it to a new email.

### Customizable toolbar

Stop hunting for the right commands from menus and dialog boxes. You can customize the Portfolio toolbar to include buttons for your most common tasks. With the click of a button you can start a slideshow, burn a disk, and so much more.

### Preview window navigation

When you preview an image, you now have controls to zoom, delete, switch to the original image, and page to other images in the catalog.

### User ID support

When you are working in a group, it is often important to know who most recently touched a file. Portfolio records each user's identity and automatically fills in the ID of the user who catalogs or modifies each item. This way you can always know where you are in your workflow.

# Getting Started

## Portfolio Overview

Portfolio helps you organize your digital files by storing information about them in easy-to-use visual catalogs. Instead of burrowing through nested folders looking for files, or opening document after document to find a needed image, you can quickly browse thumbnails of your files or perform a search for a needed item using Portfolio's powerful search engine.

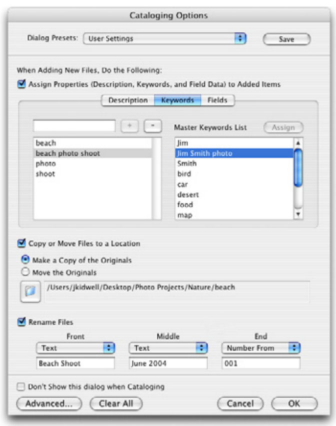
The following overview is designed to give you an overall picture of how to set up and use Portfolio. Each basic step is given a quick summary, followed by a set of page references that tell you exactly where to go in this User Guide for more detailed instructions. Use this section to get the "big picture" — then jump into the chapters that follow for a step-by-step guide to each Portfolio feature.

If you hate reading manuals, and want to start using Portfolio as quickly as possible, check out the brief Portfolio Quick Start Guide that came with your copy of Portfolio. In just a few pages, the Quick Start Guide provides streamlined instructions for setting up and using Portfolio without focusing on many of the details covered in the User Guide.

## 1. Catalog

You have to "catalog" your files — add them to a Portfolio catalog — so that Portfolio can find them, preview them and track them. This process includes creating a new catalog document and then using various techniques to add your digital files — photos, illustrations, presentations, audio or video clips, and so on — to the catalog.

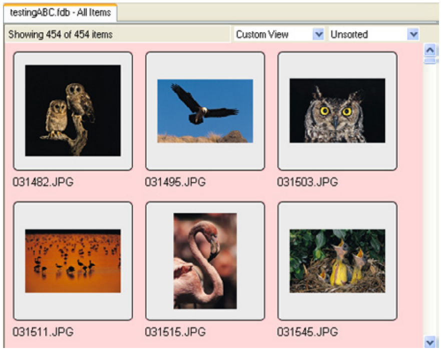
Adding files to your catalog is as easy as dropping them into an open catalog window, or using the Add to Portfolio menu, which is available with a right-click in the Windows Explorer or a Ctrl-click in the Macintosh Finder — even when Portfolio isn't running!




- ***To create new catalogs, see page 13***
- ***To open and access existing catalogs, see page 15***
- ***To add items to a catalog, see page 18***

## 2. Customize

Give your catalogs the look and style you want to make information easy to find and display. Choose between thumbnail, list and item views. Customize and save view options in Portfolio to display the background color, thumbnail size, border, font, style, spacing, and sort order you want.




- *To organize files into logical galleries, see page 42*
- *To customize the look of a gallery, see page 45*
- *To save custom views, see page 51*
- *To customize the Portfolio toolbar, see page 36*

## 3. Access

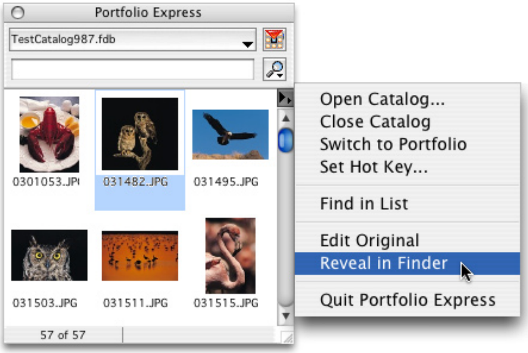
Preview files right in Portfolio, copy them to another disk, drag them into programs such as Adobe Photoshop® or Microsoft PowerPoint®, or edit them by opening them in the application with which they were created.

Using the Portfolio Express palette, you can also open and access your cataloged images without even launching Portfolio. Pull up images from within QuarkXPress®, Adobe Photoshop or any other application.


- *To open screen preview files within Portfolio, see page 53*
- *To edit your original files, see page 56*
- *To use files in other applications, see page 60*
- *To use the Portfolio Express palette, see page 121*

## 4. Organize

Using tools within Portfolio you can group, organize and categorize your files by adding keywords, descriptions, and other custom data. There's no limit to the number of keywords and custom fields you can create.

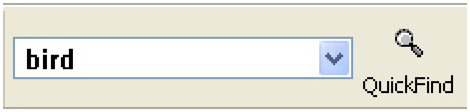



Portfolio allows you to organize files not only logically, but physically as well. Using the FolderSync feature, you can add, delete and move folders on your hard drive or network right from within Portfolio, allowing you to manage your files more easily than ever.


- *To create and assign keywords, see page 77*
- *To use custom fields, see page 81*
- *To edit information about your files, see page 85*
- *To use FolderSync to organize your files on disk, see page 69*


## 5. Find

Type a word or phrase in the QuickFind box on the main toolbar to locate any cataloged file and access it instantly. Use Portfolio's powerful search engine to find files using dozens of different criteria. Search an individual catalog, or search across multiple catalogs.

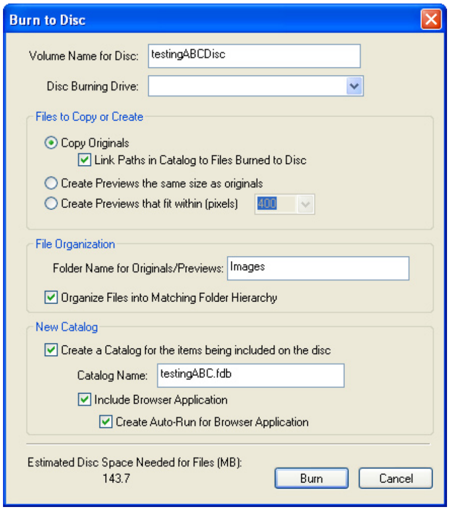




- *To quickly locate a file using Portfolio's QuickFind box, see page 91*
- *To use the Find command, see page 93*
- *To perform multi-catalog searches, see page 99*
- *To search for text inside of PDF and text files, see page 101*
- *To save a set of search criteria for future use, see page 96*

## 6. Distribute

Rather than just help you organize your files, Portfolio assists you in distributing files to other users. You can send files via email with a click, or collect an entire group of cataloged images and burn those images to CD or DVD. The Create Webpages command turns selected images in a gallery into a ready-to-publish set of pages.




- ***To email images from Portfolio, see page 103***
- ***To burn a disc directly from Portfolio, see page 104***
- ***To collect images for distribution, see page 107***
- ***To convert cataloged images into webpages, see page 110***

## Outline of the User Guide

To help you find the information you need in this user guide, here's a brief outline of its contents:

**Chapter 1: Introduction**

Installation, system requirements, registration and support information.

**Chapter 2: What's New**

A description of the new features in Portfolio 7.

**Chapter 3: Getting Started**

A "big picture" overview of the process of setting up and using Portfolio.

**Chapter 4: Setting Up Portfolio 6**

Outlines the process of creating and opening catalogs, and adding items to them.

**Chapter 5: Customizing Portfolio catalogs**

How to customize the look of catalogs; creating and saving custom views.

**Chapter 6: Managing your files with Portfolio**

Using Portfolio to preview, move, copy, rename and edit your original files.

**Chapter 7: Using FolderSync**

How to use FolderSync to manage files on disk and keep your catalogs up to date.

**Chapter 8: Organizing your files with Portfolio**

Using keywords, custom fields, galleries and other tools to get your files grouped, categorized and organized.

**Chapter 9: Finding files with Portfolio**

Using Portfolio's search engine to locate your files quickly.

**Chapter 10: Distributing files with Portfolio**

Publishing your files by emailing them, burning them to CD, collecting them to a location on your network , or creating professional looking web sites.

**Chapter 11: Using the Portfolio Express palette**

How to access your files from anywhere on your computer system with the Portfolio Express application.

**Chapter 12: Catalog Administration**

Setting up access levels and security passwords, creating custom fields and setting other administrative options in Portfolio.

# Setting Up Portfolio 7

This chapter shows you how to set up Portfolio in order to organize, track and distribute your digital files. It tells you how to create a new catalog, add items to that catalog and use Portfolio's powerful Cataloging Options to streamline the process of cataloging your collection of digital files.

## Creating catalogs

Portfolio organizes your collection of images, graphics, digital photos and other media files in a document called a catalog. A catalog stores only thumbnail images of your files (along with whatever additional information you require), and pointers to your original files – not the files themselves (which you can store anywhere you want). As a result, Catalogs are relatively small, compact documents that let you preview and organize your files without becoming unwieldy.

### Creating a new catalog when launching Portfolio

The first time you launch Portfolio, a Welcome screen offers you two options: You can either create a new, empty catalog, or open an existing catalog, as shown here.


### Welcome Dialog Box options

#### Create a new Portfolio catalog.

If you choose this option, you'll first be prompted to name and save a catalog.

When prompted, choose whether to generate screen previews. Screen previews are 72dpi previews that can be up to 2000 pixels wide. The advantage of screen previews is that they can be opened quickly without opening potentially very large original files.

A blank catalog containing no items is created and opens on screen. You're now ready to add items to the catalog, using any of the methods described in "Adding Items to Portfolio."

#### Open an Existing Portfolio Catalog

Choosing this option presents you with a standard Open dialog. Select a Portfolio catalog to open it.

***You can turn off the Welcome dialog box in Windows, so that you don't see it each time you launch Portfolio, by turning off the Show Welcome Dialog at Startup option in Preferences (Edit > Preferences) or by checking the "Don't show this dialog at launch" check box in the Welcome dialog box.***


***On a Macintosh, the Welcome dialog box only appears the first time you ever launch Portfolio. After that, you are presented with an Open dialog when Portfolio is launched.***

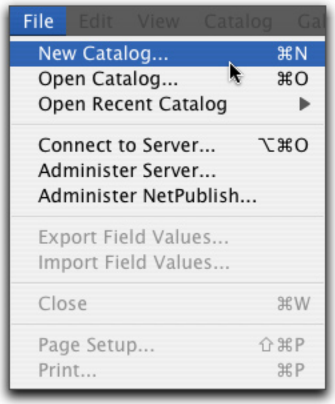
## Other ways to create a new Portfolio catalog

There are two other ways to create a new Portfolio catalog — from within the Portfolio catalog itself, or on-the-fly when cataloging from the Desktop.

### Creating a new catalog within Portfolio

- Choose File > New, or Press ⌘-N (Mac) or Control-N (Win). An empty catalog containing no items is created and opens on screen.

  You're now ready to add items to the catalog, using any of the methods described in Adding Items to Portfolio section of this guide on page 18.

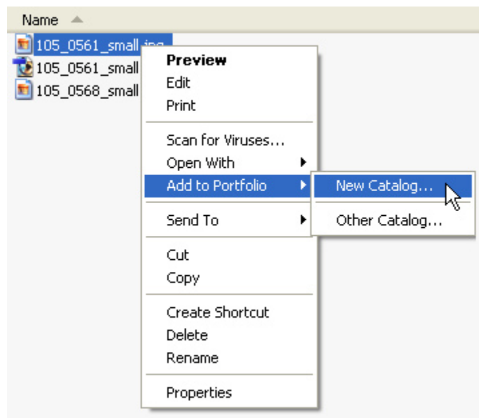



*By default, Portfolio adds an extension of .fdb to the end of catalog names. Technically, this three-letter extension isn't required on the Macintosh platform, but preserving it ensures that your catalogs will be readable by both Mac and Windows users of Portfolio*

### Cataloging from the Desktop

Portfolio lets you add items from your hard drive or network directly to a catalog by simply Control-Clicking (Mac) or Right-clicking (Win) on them within Windows Explorer or the Macintosh Finder. If you don't have a catalog ready to receive these items when cataloging, you can have Portfolio create one for you on the fly.

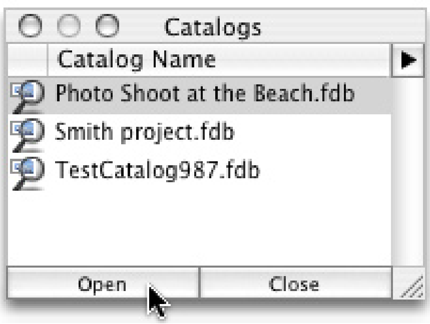
1. Control-click (Mac) or Right-click (Win) on a file, folder, or disk to catalog it.
2. Choose Add to Portfolio > New Catalog.
3. Name and save the New catalog.



## Opening catalogs in Portfolio

In addition to the Welcome dialog box, there are several other ways you can open an existing catalog in Portfolio.

- *Double-click a catalog file (it's the one with the .fdb filename extension) from the Finder or Windows Explorer.*
- *Use the recently-opened catalogs list in Portfolio's File menu. On a Mac, choose File > Open Recent Catalog > your catalog name. In Windows, recently-opened catalogs appear on the File menu, directly under the Print command.*
- *If you have the Catalogs palette displayed (Window > Show Catalogs), you can click the Open button, use the Open command on the palette's fly-out menu, or select a recently-used catalog by name from the fly-out menu.*




## Converting Catalogs from earlier versions of Portfolio

To access the new features added to this new version of Portfolio, catalogs created by previous versions of Portfolio must be converted to version 7 catalogs. Portfolio 7 can open version 6 catalogs without conversion, in a limited browsing mode.

*Although Portfolio is capable of opening and converting catalogs created with Portfolio 5.x (and earlier), for best results we recommend that you first open and convert such documents using Portfolio 6, and then convert your catalogs from version 6.x to 7, as outlined below.*

**To convert a Portfolio 6.0 catalog:**

1. Make a backup copy of your original 6.x catalog.
2. Open the catalog to be updated.
3. Portfolio 7 automatically switches you to Administrator mode. Enter the appropriate password if the catalog requires a password for Administrator level access.

   *Once the catalog is converted to a Portfolio 7 catalog, you won't be able to open it using Portfolio 6.x.*

4. You are prompted to confirm the conversion. Click OK.

   The catalog is converted and all options (catalog options, saved galleries, etc.) are preserved.

   Choose Cancel to leave the catalog version unchanged, opening it in limited browsing mode.

*If you created custom metadata fields for a Portfolio 6 catalog, you may need to recreate some of these mappings in your converted Portfolio 7 catalog.*

## Catalog Access Levels & Security

Every Portfolio catalog can be password-protected for security. In addition, as the Administrator of your catalog, you can assign varying levels of access to different users.

### The four possible levels of access are:

#### Administrator

This mode provides full access to all features. An administrator can assign passwords to other users, create custom fields, and control cataloging and startup options that other users can't. By default, when you create a new Portfolio catalog, you have Administrator access to that catalog. When a catalog is opened in Administrator mode, no one else can use it.

#### Publisher

Publishers can add, remove, export and edit items in a catalog, but can't access administrative functions such as creating a new custom field, creating a master keyword list or changing passwords.

#### Editor

In Editor mode, you can search, preview, access and edit information about cataloged items, but you can't add new items to a catalog, rename files or export items to the web or QuickTime movies.

#### Reader

As a Reader, you can view, search, preview and copy items — but you can't make any changes in the catalog. It's a "read-only" mode.

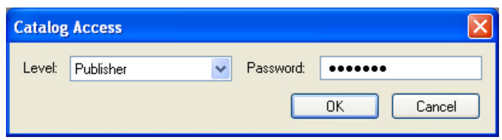
In Portfolio, each of these levels can have its own password. Alternatively, a catalog administrator can assign an access level and password to individual users to more closely control who has access to a catalog and what level of access they have.

***For details on how to set up access-level passwords and create user-level access privileges for a Portfolio catalog, see the Catalog Administration chapter of this guide.***

For now, here's what you need to understand about access privileges and security:

### Opening a password-protected catalog

If a catalog administrator has protected a catalog with a password, you'll be prompted to enter the password each time you try to open the catalog. Simply select the Access Level you want to use (Administrator, Publisher, Editor or Reader) from the Level drop-down menu, then type in the password and click OK.



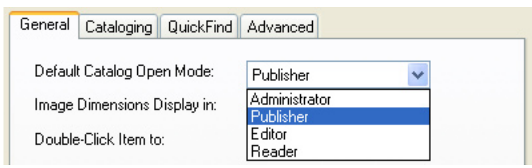
## Setting a default open mode

You can set your copy of Portfolio to open catalogs in one of the four access-level modes by default. If you know that you have Publisher-level privileges to your catalogs, for example, you can tell Portfolio to automatically open catalogs in Publisher mode. If you are the administrator of your Portfolio catalogs, you might want to have Portfolio always open catalogs on your computer in Administrator mode.

**To set a default open mode:**

1. Choose Edit > Preferences.

2. On the General preferences tab, choose a Default open mode from the drop-down menu to select an access level. This is the level at which Portfolio attempts to open each catalog.




Of course, regardless of which level is set, you'll still need to know the password (if there is one) in order to open the catalog.

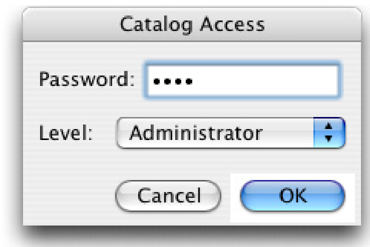
## Changing your access level

At any time you can change the level at which you're currently accessing a catalog. For example, you may have opened a catalog in Publisher mode, but then need to make some changes to it (adding a new custom field, for instance) that requires administrative access. Without closing the catalog or quitting Portfolio you can change your access level from Publisher to Administrator, make the required changes, then switch your access back to Publisher again.

**To change access levels:**

1. Choose Catalog > Access Level, or press ⌘-J (Mac) or Ctrl-J (Windows), to open the Catalog Access dialog box.

2. Choose an access level from the the Level drop-down menu.




*If you get an error indicating that you can't change your access level because the catalog is already opened by another user - and you know that you are the only user in the catalog, close any catalogs you have open in the Portfolio Express Palette.*

3. If necessary, enter a password and click OK.

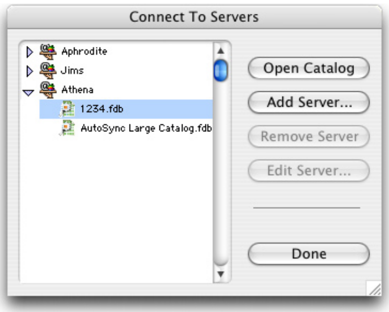
## Opening a served catalog

If your workgroup is using Portfolio Server you can open a Portfolio catalog using the Connect to Servers command. Portfolio Server provides optimized performance for workgroups that share Portfolio catalogs across a network.

### To Open a catalog on a Portfolio Server:

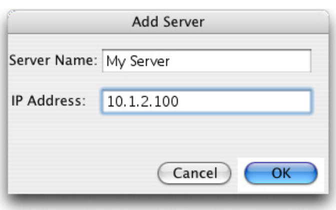
1. Choose File > Connect to Servers, or press ⌘-Option-O (Mac) or Ctrl-Shift-O (Windows). The Connect to Servers dialog is displayed.

2. If a list of servers and catalogs appears, skip to step 4.




If the list is blank or if the server you want to access does not appear: Click Add Server. The Add Server dialog is displayed.

3. Enter a name and the IP address of the server that you want to connect to. Portfolio connects to the Server and displays a list of catalogs available on that Server.




4. Expand each server entry by clicking the twisty triangle (Mac) or "+" symbol (Windows) to see which served catalogs are available. Select the desired catalog from the list, then click Open Catalog, or double-click the selected catalog to open it.

***You are asked to enter a password if the catalog requires it.***

The next time you use the Connect to Servers command, all the servers you added — and all available catalogs on those servers — will be displayed on the list, ready to open.

***For more information on administering catalogs, and servers, refer to the Catalog Administration chapter and the Portfolio Server User Guide.***

## Adding Items to Portfolio

In order to organize and track your files with Portfolio, you must first add those files to a Portfolio catalog. To add items to a Portfolio catalog, you must have Publisher or Administrator access to the catalog. You can't add items to a catalog when in Editor or Reader mode.

You can catalog individual files (such as a JPEG image, or an EPS graphic), or folders, or entire volumes (such as your hard drive, a CD-ROM or a DVD). There are five different ways you can add items to a Portfolio catalog.

### Instant Cataloging

This is a fast way to add items to Portfolio. Control-click (on a Mac) or right-click (on Windows) a file, folder or disk icon anywhere within the Macintosh

Finder or Windows Explorer and choose the Add to Portfolio command submenu to see a list of recently-used catalogs. Select the catalog to which you'd like the selected items to be added. If the catalog you need isn't listed, choose Other Catalog to open it.

### Drag & Drop

Simply drag a file, folder or disk into an open catalog window to catalog it.

### FolderSync

Add a folder from your computer or network to Portfolio's Folder View by clicking the New button in the Folder View pane, then click the Sync button to catalog the contents of the selected folder. See the FolderSync chapter of this guide for instructions about using FolderSync.

### Add button

Click the Add button in the main Portfolio Toolbar. Select any file, folder or disk in the Open dialog box. If you select a folder or disk, you can turn on the Include Subfolders check box to catalog any files that are inside folders nested within the selected folder or disk volume.

### Catalog menu

Choose Add Items from the Catalog menu. Select any file, folder or disk in the Open dialog box. If you select a folder or disk, you can turn on the Include Subfolders check box to catalog any files that are inside folders nested within the selected folder or disk volume

***You can also add items to Portfolio as a hands-off background operation, using Background Cataloging.***

## Adding Placeholders

Normally, Portfolio creates an entry (also called a record or item) for each digital file that you catalog. But, in some cases, you may want to enter a item in a Portfolio catalog for a file that doesn't exist — perhaps one that you haven't yet received or created. This is called a Placeholder. Think of a Placeholder as a stand-in for a file that you know you'll be including in your catalog, but that you don't have yet.

Placeholders behave just like other items in a Portfolio catalog. You can assign them keywords, add descriptions to them, perform searches for them, and so on. The only difference is that the Placeholder doesn't yet have a specific media file associated with it. At any point in the future, you can link a Placeholder to an actual file on disk, turning it into a regular Portfolio catalog item. If you give the Placeholder the same name as the file you eventually link it to, Portfolio can automatically find the file and catalog it when you update the Placeholder.

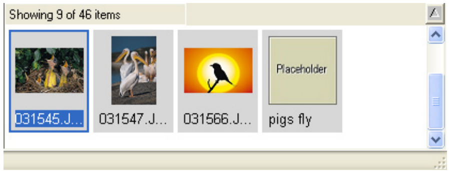
**To create a Placeholder:**

1. Choose Catalog > Create Placeholder.

2. Name the Placeholder. Type the name into the Filename field. If possible, this should be the name of the file that the Placeholder is standing in for – the one that you'll eventually use to replace the Placeholder. This will make updating much easier later on.

3. Specify a location (Optional). Check the Specify Folder on Disk option to set the location where you will eventually place the file that the Placeholder is standing in for. If you don't know where you're going to put the file, you can leave this blank.

If you do know it, setting this location makes updating the Placeholder much easier.




4. Click OK. A new item with a thumbnail containing the word Placeholder appears in your catalog.

**To link a Placeholder to a file:**

Linking a Placeholder to an actual file on disk turns it into a regular Portfolio catalog item.

1. Select the Placeholder.

2. Choose Item > Update, or press Command-U (Mac) or Control-U (Win)

   If the name of the Placeholder exactly matches the name of the file you're linking to, and you've specified the right folder in which to find it, the Update command automatically links the item to the matching file.

   If Portfolio doesn't see a file with the same name as the Placeholder in the current directory, you'll see an Open dialog box, in which you can locate the desired file. Select the file you want and click Open.

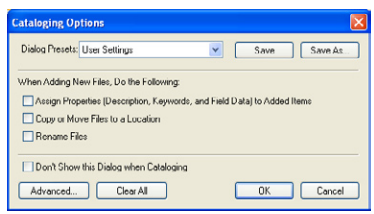
## Cataloging Options

When you add items to Portfolio, there are many options available that determine exactly how Portfolio stores information about your files. You can control these various options by choosing the Cataloging Options command from the Catalog menu. By default, the Cataloging Options window opens each time you catalog files, unless you specifically tell it not to do so by turning on the "Don't show this dialog when cataloging" check box in the Cataloging Options window.

Cataloging Options in Portfolio allow you to perform very powerful tasks with a minimum of effort. You can also save your cataloging options, so it is easy to quickly reuse cataloging settings. Here are some of the things you can do when cataloging your images:

- ***Rename files***
- ***Insert descriptive text about each cataloged file***
- ***Add keywords***
- ***Fill in custom fields associated with each item***
- ***Copy or move files from one location to another***

When you first open the cataloging Options dialog box, the dialog is displayed in a compact form. As you choose options, the dialog expands to display the full range of options available.

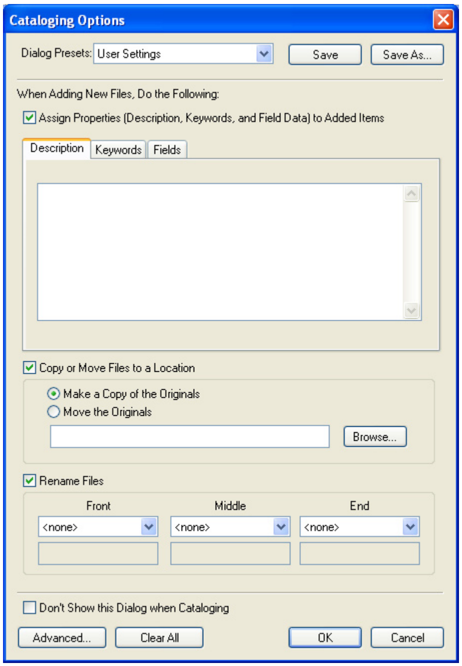


**To change Cataloging Options:**

- Choose Catalog > Cataloging Options.

  – or –

  Press ⌘-Option-D (Mac) or Ctrl-Shift-D (Windows).




This opens the Cataloging Options window, where you set cataloging options.

## Saving and using Cataloging Options presets

When cataloging files with Portfolio, there are so many things that you can do, so Portfolio gives you the option to save your settings to use again later.

For example, you may have a project about race cars where you want to add the keywords “car” and “race” as well as move the new files to a specific project directory. If you save these cataloging options, with future files you can simply choose the preset from the Dialog Presets drop-down menu and click OK.

Saved cataloging options can also be used during background cataloging. When used in conjunction with watched folders, files can be automatically moved, keyworded and cataloged without any interaction from you. For more information, see the Customizing Portfolio Catalogs chapter.

**To save cataloging options:**

1. Choose Catalog > Cataloging Options
2. Enter your chosen cataloging options
3. At the top of the dialog click Save to save settings to the current dialog preset.

   – or –

   Click Save As to save the options to a new dialog preset.
4. Click OK to dismiss the Cataloging Options dialog box.

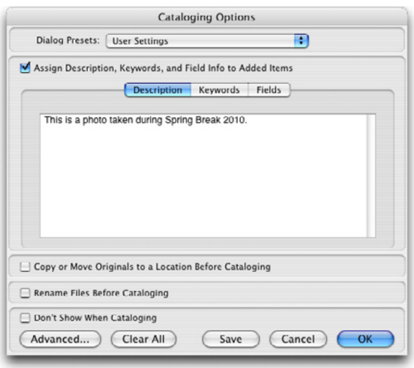
## Assigning Properties

Portfolio allows you to store keywords and descriptions for each of the digital files that you catalog. In addition, you can create an unlimited number of custom fields to store other information about your files – dates, URLs, numbers, or any other data you wish. To set up custom fields in a catalog, see the chapter on Organizing Your Files with Portfolio.

Using the Portfolio Cataloging Options window, you can assign keywords, descriptions and other field values to your files while cataloging — rather than waiting and assigning them after you've cataloged the items.

### To assign a description during cataloging:

Using this feature, you can insert a description into the Description field of each file as it is cataloged. For example, if you are cataloging a folder of pictures of the Grand Canyon, you could automatically assign the description "Photo of the Grand Canyon, taken on May 14, 2001" to each file as it is being cataloged. Descriptions can be as long as 32,000 characters.




1. In the Cataloging Options window, check the Assign Properties option and click Description.

2. Type a description into the Description field.

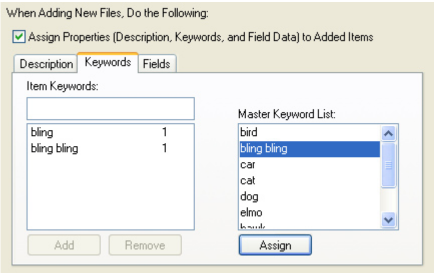
3. Click OK.

4. The description you typed will be filled on all the items you now catalog.

### To assign keywords during cataloging:

This feature adds the keywords you specify to each of the files you catalog in Portfolio. If, for example, you were going to catalog 100 photos of a tropical beach, you could assign keywords such as Beach, Ocean, Tropical, Sun or Seaside to each item as it is being cataloged, saving you the trouble of adding and assigning these keywords later.

1. In the Cataloging Options window, check the Assign Properties option and choose the Keywords tab.




2. In Keyword entry field, type in a keyword that you would like to add to each incoming item that you are about to catalog. Remember, the keywords you enter here will automatically be applied to all the items you catalog. Or, to use keywords that already appear in the Master Keyword list, select the words in the list and click the Assign button.

*To edit the master keyword list in the Catalog Administration dialog. choose Catalog > Administration to open the dialog and then choose the Keywords tab to edit the master keyword list for this catalog.*

3. Press the Add button to add the keyword to the list of Keywords.

4. After you've inserted all the keywords that you want to include, click OK.

5. The keywords you added are now applied to the items as you catalog them.

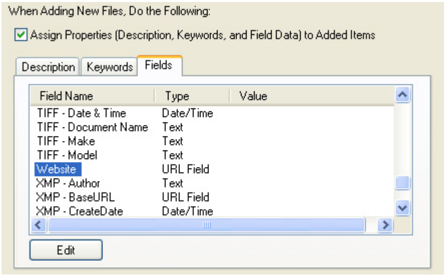
**To assign custom field values during cataloging:**

This option fills in values for any of the custom fields you've created in Portfolio as you catalog files in Portfolio. For example, if you've created a custom field that contains the name of the photographer who shot each digital photo that you catalog, you can have Portfolio fill in the photographers name on the fly as you catalog the images.

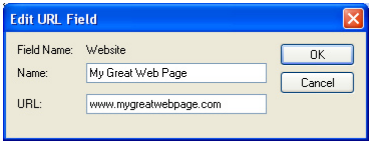
***In order to assign field values during cataloging, you must already have set up custom fields in your Portfolio catalog. See the Organizing Your Files with Portfolio chapter of this guide for instructions.***

1. In the Cataloging Options window, check the Assign Properties option and choose the Fields tab. You'll see a list of the custom fields available to you in the catalog. This includes metadata - see Metadata Properties Settings later in this chapter for more information.

2. Double-click the name of the custom field to which you would like to assign a value.




3. Edit the field. Remember, the values you enter here will be applied automatically to all the items you next catalog. Click OK when you're done editing.




4. After you've edited the content for all the custom field values you want to assign when cataloging, click OK.

5. Custom fields for the items you catalog will now be assigned the values you defined.

**To move and copy files during cataloging:**

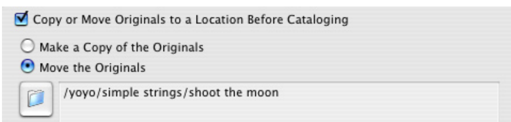
Portfolio can copy or move files when cataloging them, placing them in the exact location you want. This is useful if you're pulling images off of a CD, digital camera or memory card, and you want your Portfolio catalog to link to new copies of the files that are stored in a folder on your system or on your network, rather than the original CD or storage disk. Instead of first copying the files manually, and then cataloging them, you can have Portfolio handle both tasks — first copying the files for you, then cataloging them — in one step.

### Move vs. Copy

When cataloging, Portfolio can either move or copy your original files. It's important to understand the difference: Copying a file makes a duplicate of it in the new location, leaving the original untouched. Moving a file places a copy of the file in the new location and removes it from its original location.

### To have Portfolio move or copy files when cataloging:

1. Turn on the Copy or Move Files check box.
2. Copy or Move files by clicking the appropriate radio button. Remember, copying a file makes a duplicate of it in the new location, while moving it places a copy of the file in the new location and removes it from its original location.
3. Set a destination for the new files. Click the brose button (Win) or folder icon (Mac) to select the location in which Portfolio will place the cataloged files.
4. Click OK. Portfolio will now either move or copy each file you catalog to the specified location.




### To rename files during cataloging:

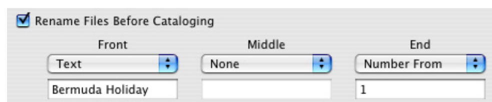
Portfolio can rename your files as you catalog them, saving you from having to rename each one of them individually. This is particularly useful if you're downloading images from a digital camera. As they are saved on the camera's memory card, the files may have generic names such as PIC000045.JPG, PIC000046.JPG, and so on. With Portfolio you can automatically replace those names with something more descriptive, such as "Bermuda Holiday 01, Bermuda Holiday 02, etc…"

With saved cataloging options, Portfolio also remembers where you left off when numbering new files. So, if you separate sets of beach pictures, and the last file was named "Bermuda Holiday 04" the next file cataloged with these options will be named "Bermuda Holiday 05."

Of course, you ultimately may want to give each individual file an even more specific name; Portfolio provides several easy ways to do this, after you've cataloged the images. See the chapter on Managing Your Files with Portfolio for more information.

### To have Portfolio rename files during cataloging:

1. Expand the Cataloging Options window so that the Move and Rename Options are visible.
2. Turn on the Rename Files check box.



3. Choose a naming scheme using the three drop-down menus. The naming options available are:

   **Text.** Type a descriptive text string up to 31 characters long.

   **Number from.** Enter any number. If you catalog more than one file, Portfolio will increment the number by one when naming each file. If you enter the number 001, for example, and catalog three images, their names will contain the numbers 001, 002, and 003.

   **Original File name.** Includes the original file name within your new naming scheme.

   **None.** Does not apply any renaming scheme to your files.

   You can apply these options in any order and combination to make up the front, middle and end of the new naming scheme.

4. Once you've entered the naming scheme you want, click OK to apply the cataloging options. The next files you catalog will be automatically renamed according to the scheme.

***Remember to change these settings the next time you catalog items, or the same names and numbering will be applied to the next batch of files.***

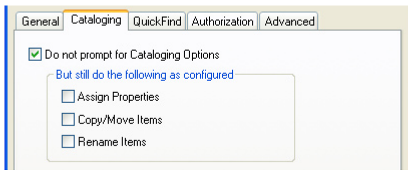
## Hiding the Cataloging Options window

By default, Portfolio displays the Cataloging Options window each time you catalog a new file, folder or disk. This gives you a chance to modify these options before cataloging items. However, if you know that the options are set correctly and don't need to review them, you can choose to keep this window hidden by checking the "Don't show this dialog when cataloging" option at the bottom of the Cataloging Options window. This allows you to catalog files without an interrupting dialog box.

If, after keeping Cataloging Options hidden, you need to see them again in order to make changes, simply choose Catalog > Cataloging Options before cataloging a new item and turn off the "Don't show..." option.

## Preferences for Cataloging Options

You can also keep the Cataloging Options window hidden at any time by activating the "Do not prompt for Cataloging Options" check box in the Cataloging tab of the Preferences dialog box. Choose Edit > Preferences to open this dialog in Windows, and choose Portfolio > Preferences on a Mac.




The three check boxes in the "But still do the following as configured" section of the Cataloging Preferences tab lets you determine which cataloging options will be performed and which will be ignored when the Cataloging Options dialog is configured to remain hidden.

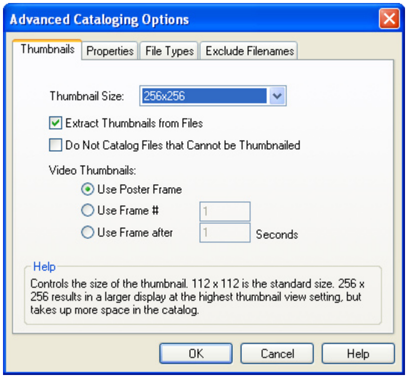
You can clear these check boxes as a precaution against moving or renaming files unintentionally when cataloging. Leaving the Rename Items check box turned off, for example, means that Portfolio won't rename files as you catalog them unless you specifically show the Cataloging Options dialog box to confirm the renaming scheme.

**Cataloging Summary.** These check boxes determine how Portfolio handles problems that it encounters when attempting to catalog files. If you want Portfolio to alert you to a problem — such as a corrupted file that cannot be cataloged— during the cataloging process turn on the “Report cataloging errors” check box. The second option, “Log cataloging errors to file” creates a text file in the same directory as your catalog, logging all cataloging activity.

## Advanced Cataloging Options

For even greater control over how Portfolio handles the process of cataloging your files, click the Advanced button on the Cataloging Options dialog. This opens the Advanced Cataloging Options dialog box. You can also choose Catalog > Advanced Cataloging Options to go directly to this window. The options available in the five tabs within the window control the following issues related to cataloging new items:

- *The size of thumbnail images.*
- *The type of information Portfolio extracts from your files when cataloging them.*
- *The creation of keywords from file names and paths*
- *The automatic import of TIF, IPTC and EXIF data into Portfolio*
- *File types that Portfolio automatically includes or excludes when cataloging.*




### Thumbnail Options

The options on this tab determine how Portfolio creates or extracts thumbnails of your images for use in a Portfolio catalog.

**Thumbnail Size.** This setting determines the size (in pixels) of the thumbnails created and stored by Portfolio — either 112 x 112 pixels, or 256 x 256 pixels. If you want to display 256 x 256 thumbnails in your catalogs, you must set the Thumbnail size to the higher setting. If your catalog views only require thumbnails that are 112 x 112, 64 x 64, or 32 x 32 pixels, you can leave this setting on 112. The lower setting will result in catalogs that are smaller in size.

**Extracted vs. generated thumbnails.** Many graphics and page-layout programs automatically create thumbnail-size preview images and embed them in saved files. For example, JPEG and TIFF files commonly have embedded thumbnail images. By turning on the Extract Thumbnail

check box, you can have Portfolio extract these embedded thumbnails instead of generating its own thumbnails during the cataloging process. The benefit of generating thumbnails is a much higher quality and more consistent thumbnail in the catalog, though it can significantly slow down the cataloging process.

The extract thumbnail option is on by default.

If you don't want Portfolio to catalog files for which it can't either extract or generate a thumbnail, check the Do Not Catalog Files That Cannot be Thumbnailed option.

**Video thumbnails.** When you catalog digital movie files with Portfolio, you have a few additional thumbnail options.

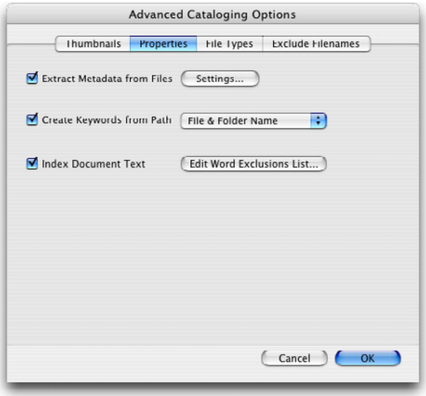
- ***Use Poster Frame displays a thumbnail of the first frame of a cataloged movie.***
- ***The Use Frame # options lets you select a specific frame that will be used to generate a thumbnail. You can select a frame that appears a specified number of seconds after the start of the video clip.***


## Properties Options

The Properties tab of the Advanced Cataloging Options dialog box contains several options that control the kind of information Portfolio extracts from your files when cataloging them.

## Extracting metadata while cataloging

Many digital cameras, software programs and other devices embed specific information into a file when that file is created. For example, a digital camera typically embeds EXIF data such as aperture, shutter speed, date taken, etc. Portfolio can automatically detect and extract embedded EXIF, XMP, IPTC and TIFF metadata and add it to your catalog, saving you the trouble of having to re-enter the information manually. Portfolio can extract metadata from JPEG, TIFF, PixelLive (VFZ), and PixelSafe (PFZ) files.




By default, Portfolio extracts a wide range of embedded metadata, you can further expand the metadata fields and choose where Portfolio stores this information in the catalog. Click the Settings button to open the Metadata Properties Settings dialog box.

## Metadata Properties Settings

In the Metadata Properties Settings dialog box you can define which metadata fields are extracted, and map exactly where in the catalog the information is stored by Portfolio.

There are two important lists that control how Portfolio maps metadata.

- *The **Metadata List** is a list of all of the potential metadata fields that Portfolio can accept.*
- *The **Catalog Field List** is a list of all of the default and custom fields where Portfolio can store metadata in the catalog.*

For each piece of metadata that you want to extract, you must have an appropriate Catalog Field mapped in the dialog. By default, Portfolio extracts the most common metadata and stores it in the catalog.

It is also possible to embed metadata back into your original JPEG, TIFF, PixelLive or PixelSafe files. On the Embedding Data tab of the dialog, you can map any Portfolio catalog field to an XMP or IPTC metadata field in your original file.

*If you created custom metadata fields for a Portfolio 6 catalog, you may need to recreate some of these mappings in your converted Portfolio 7 catalog.*

**To change where Portfolio stores specific metadata:**

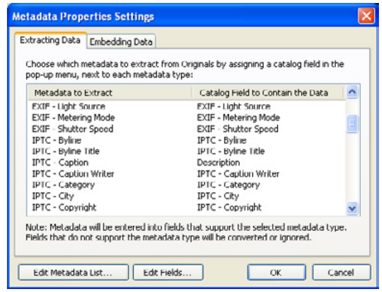
If you want to store metadata in a different catalog field, use the following procedure.

1. In the Advanced Cataloging options dialog box, on the Properties tab, click the Settings button.

   – or –

   Choose Catalog > Metadata Settings

2. In the Metadata Properties Settings dialog box, on the Extracting Data tab, click to highlight the specific Metadata to Extract field to update.




3. On the right hand side of the dialog, click the corresponding Catalog Field to change and choose a catalog field from the list.

**To add a new metadata field to the metadata list:**

*The most commonly used metadata fields are already defined in the metadata list. Most users can use the current fields and do not need to add new metadata fields to the list.*

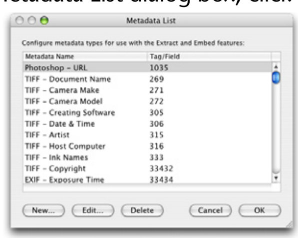
1. In the Advanced Cataloging options dialog box, on the Properties tab, click the Settings button.

   – or –

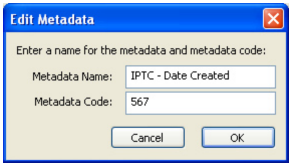
   Choose Catalog > Metadata Settings

2. In the Metadata Properties Settings dialog box, click the Edit Metadata List button.

3. In the Metadata List dialog box, click New.



4. Enter a new Metadata Name and Metadata Code. The Metadata Name can be anything that adequately describes the data, but the Metadata Code must specifically match the code in the file. This code can typically be obtained from the manufacturer of the device that created the file. Many of these codes can also be readily found on the internet.




***IPTC codes must be converted so that Portfolio can understand them. If your IPTC code is comprised of two numbers separated by a colon, use the following formula to obtain the code to enter: (First Number * 256) + Second Number = Portfolio Metadata Code.***

5. Click OK to save your changes to the Metadata List.

### An example of extracting uncommon metadata

You have a file that contains a piece of metadata that you want to track, but is not currently tracked by Portfolio. To do this, you must first add the new metadata to the Metadata List. Use the previous procedure to add a the new data item to the list.

After doing so, you need to create a new custom field in the Portfolio catalog to store the new metadata. See the chapter on Organizing Files with Portfolio for details on creating new custom fields.

After you have defined the new metadata field and created a new custom field, you must map the new metadata field to the custom field. Open the Metadata Properties Settings dialog box, click to highlight the new metadata field, and then choose the new custom field from the list on the right.

The next time you catalog or update a file that contains this metadata type, the new data is extracted.

## Extracting metadata

If you did not have metadata extraction enabled when you cataloged your files, you can extract the metadata after the fact.

### To extract metadata from cataloged files:

1. Click to highlight files to process in any of your galleries.

2. Choose Item > Extract Properties.

   This extracts the metadata mapped in the Metadata Properties Settings dialog box into the appropriate Portfolio fields.

## Embedding metadata

Portfolio can also embed metadata and other information back into your files. This way you'll never lose the work you put into properly keywording and tagging your files.

***Portfolio can embed metadata into JPEG, TIFF, PixelLive (VFZ) and PixelSafe (PFZ) files. If you attempt to embed metadata into other file types, Portfolio prompts you that the file type is unsupported.***

### To embed metadata:

1. Click to highlight files to process in any of your galleries.

2. Choose Item > Embed Properties.

   This embeds the metadata mapped in the Metadata Properties Settings dialog box into the appropriate locations in the original files.

## Indexing document text

With the Index document text option turned on, Portfolio indexes the text of Adobe PDF (Portable Document Format) files, as well as plain text documents, when they are cataloged. Each word in the cataloged documents is saved in the catalog index, allowing fast searches and retrievals.

***Turning on text indexing slows down the cataloging of PDF files. It is recommended you turn this option on only if it is critical that you be able to search for text within PDF files when using Portfolio to retrieve documents.***

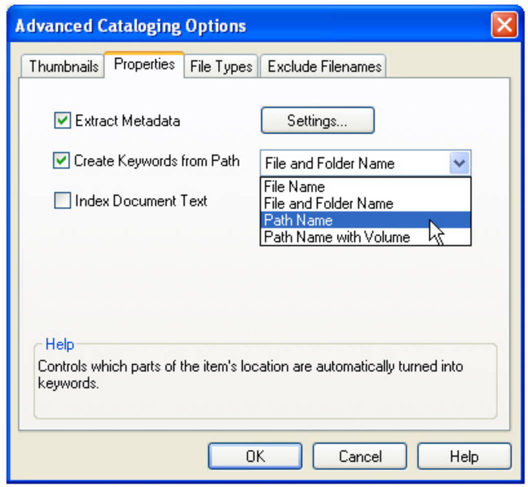
**Exclusions.** You have the option of excluding words from Portfolio's text-indexing operations. You might want to exclude words in order to speed indexing time and reduce the size of your Portfolio catalogs.

**To exclude words from text indexing:**

1. Click the Edit Exclusions List
2. In the entry field, type a word that you want Portfolio to ignore when indexing
3. Click Add
4. Repeat Steps 2 and 3 to add as many words as necessary to the exclusion list.
5. Click OK.

## Creating Keywords from a Path

This is a powerful and important feature of Portfolio that can save you hours of typing. By turning on the Create keywords from paths option, you can have Portfolio add keywords to each file you catalog, based on the name and location of each file on disk. Portfolio does this by examining the full path of each cataloged file and then extracting the words in all or part of that path to make keyword entries. The drop-down menu determines how much of the path is used to create keywords.




To illustrate how this works, imagine that you catalog a file with the following path on your computer:

```
Hard Drive: Current Projects: Newsletter:
Travel Photos: Bermuda: SUNSET.JPG
```

The following is a list of each of the drop-down menu options available and the resulting keywords produced when you catalog this file:

| Menu option | Keywords produced |
|---|---|
| *File Name* | *SUNSET.JPG* |
| *File and Folder name* | *SUNSET.JPG*<br>*Bermuda* |
| *Path Name* | *SUNSET.JPG*<br>*Bermuda*<br>*Travel*<br>*Photos*<br>*Newsletter*<br>*Current*<br>*Projects* |
| *Path Name with Volume* | *SUNSET.JPG*<br>*Bermuda*<br>*Travel*<br>*Photos*<br>*Newsletter*<br>*Current*<br>*Projects*<br>*Hard*<br>*Drive* |

As you can see, by creating keywords from folder and path names, you can easily add a large number of meaningful keywords to the items in your catalog without having to type them. In the example above, you would now be able to easily search for the SUNSET.JPG picture in Portfolio simply by typing words such as Sunset, Bermuda, or Travel because they all were automatically added as keywords.

## File Types

Portfolio is capable of cataloging virtually every type of digital file, and by default the program is set up to catalog all file types. But if you want Portfolio to catalog only specific types of files — such as JPEG or TIFF files — or to ignore (and therefore not catalog) certain types of files, you can set such limitations up in the File Types panel.

You may, for example, want to catalog all the digital photos on your hard drive, telling Portfolio to ignore every file except the JPEG and TIFF files that it finds. Or, you may decide you want to catalog every file in a folder except for font files. You can specify such exceptions in the File Types panel.

**To exclude certain file types from being cataloged:**

1. In the File Types panel of the Advanced Cataloging Options dialog box, change the radio button setting from Catalog All File Types to Catalog only the Following Type.

2. In the File Types list, clear the checkmark next to each file type that you don't want Portfolio to catalog.

**To add a File Type to the list of files included/excluded:**

***You only need to add file types to the list if you want to exclude a type that does not appear on the list, or if you will be excluding some types and including other types that do not appear on the list.***

1. Click the Add button in the File Types panel of the Advanced Cataloging Options dialog box.

2. Enter the file type information, or click Same As and locate a file of the same type. Portfolio copies the parameters of this file type into the fields.

3. Click OK to add this file type to the list.

### File Type Preferences

When you define File Types in Advanced Cataloging Options, there are two check boxes, giving you the choice of storing file type definitions in the catalog itself or as a user preference on your computer, or both.

- ***Store in Preferences (Store "Locally" on Windows):*** *With this preference, your decision to include or exclude certain file types will not affect other Portfolio users who choose to add items to the catalog.*
- ***Store in Catalog:*** *All users of this catalog will include/ exclude this type of file when cataloging.*

### Exclude Filenames

Using the Cataloging Options Exclude Filenames tab you can force Portfolio to ignore files with a specific filename by creating an "exclusions" list that specifies an explicit set of file names or patterns.

**To add a File Name to the exclusions list:**

1. In the Exclude Filenames tab, select the file name search parameter from the drop-down menu: Begins With, Contains, or Ends With.
2. Enter the filename or partial name that you want to exclude from cataloging. Letter case (uppercase/ lowercase) is ignored.
3. Click Add.

Portfolio searches each path name and each segment of the path for text strings matching any of the parameters you enter. For example: If you enter "Begins with: DUP" and "Ends with: 97" Portfolio will exclude "Duplicate_PH050," "Report_97," and "C:\Duplicates\Image.jpg."

## Creating Screen Previews

Portfolio allows you to preview each item you catalog by directly opening the original file and displaying it within Portfolio. However, when cataloging files, you also have the option of creating screen previews, which allow you to preview images in Portfolio without the original file being present.

When you first create a catalog, you are prompted to choose whether to turn on screen previews for the new catalog. With Screen Previews is turned on, Portfolio saves it's own preview copy of each item in your catalog — separate from the original file itself — as a JPEG image in a location that you specify. Using Screen Previews offers two advantages:

- ***You can preview items in Portfolio much faster, because Portfolio doesn't have to render the file first. It simply opens the preview image.***
- ***You can preview items that are offline. For example, if you create Screen Previews, you can view full-size previews of items cataloged from a CD or DVD without the CD even being mounted.***

Of course, using Screen Previews can slow down the cataloging process (as Portfolio creates a preview file for each cataloged image) and requires more disk space for the preview files of each cataloged item.

***Creating Screen Previews is an Administrative function in Portfolio. You must have Administrator-level access to enable this feature..***

### To create Screen Previews:

1. Choose Catalog > Administration and in the Catalog Administration dialog box choose the Previews tab.
2. Check the Generate Low Resolution Previews option.
3. Click the folder button to select a location for the preview images. This is where Portfolio will store each screen preview file — one for each item you catalog.
4. Set a maximum size (in pixels) for the preview images. The maximum size of the long side of a preview image is 2000 pixels.
5. Click OK. Portfolio creates a JPEG preview file for each new file that you catalog.

## Generating screen previews for files already cataloged

You can have Portfolio generate screen previews for your files, even after they've been cataloged, using the following procedure:

1. Turn on the Generate Low Resolution Previews option, as described on the previous procedure.
2. Select the items in your catalog for which you want to create screen previews.
3. Choose Item > Regenerate Thumbnail.

***Screen previews are also generated when you have Generate Low Resolution Previews turned on and you update an existing item in Portfolio.***

# Portfolio Preferences

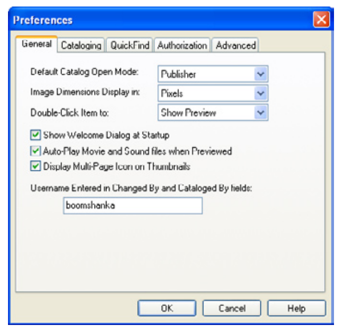
Most of the user preferences contained in Portfolio's Preferences dialog box are discussed elsewhere in this User Guide, in connection with the specific features to which the preferences relate. However, some of the preferences — those of a more general nature — are summarized in this section.

### To open the Portfolio Preferences dialog box:

- In Windows, choose Edit > Preferences
- On a Mac, choose Portfolio > Preferences.

## Preferences — General

These options primarily relate to how Portfolio displays thumbnails, shows previews and handles the deleting of cataloged items.




### Default Open Mode

Set your copy of Portfolio to open catalogs in one of the four access-level modes (Reader, Editor, Publisher, or Administrator) described earlier in this chapter.

#### Image Dimensions

Select the unit of measure for displaying image dimensions. This applies to displays in the gallery and preview windows.

***Pixels are the only unit of measure used in height and width fields.***

#### Double-click Item to

This option allows you to define how Portfolio behaves when you double-click a thumbnail. You can have it open the Item Properties window for the item, open a preview of the item, or open the original item for editing (using the file's "parent" application).

#### Show Welcome/Open Dialog at Startup

On Windows, this option turns off the Welcome dialog box that offers to open an existing catalog or create a new catalog each time you launch Portfolio. On a Mac, this option turns on and off the automatic display of the Open dialog each time Portfolio is launched.

#### Autoplay Movie and Sound Files When Previewed

When selected, movie and sound files are played automatically in preview windows; you don't need to click the Play button.

#### Display Multipage Icon on Thumbnail

When selected, a small multiple-page icon is added to the lower right-hand corner of PDF, PowerPoint®, and TIFF files that contain more than one page.

#### Username

The username that you enter into this field is tracked by Portfolio when you catalog or change files. By default, when you install Portfolio, your username is entered into this field.

### Cataloging Preferences

These preferences are explained in detail earlier in this chapter, under the heading "Preferences for Cataloging Options."

### QuickFind Preferences

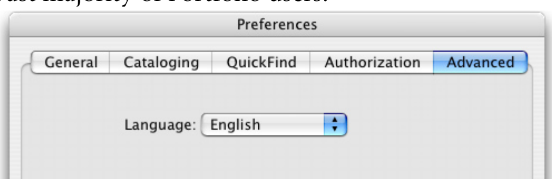
The QuickFind preferences are covered in Finding Files with Portfolio chapter under the heading "Customizing QuickFind searches."

### Authorization Preferences

On this tab you can control access to PixelLive, PixelSafe and MrSID files. For more information see the Managing Files with Portfolio chapter.

### Advanced Preferences

You probably won't have to touch the Advanced Preferences; the default settings are correct for the vast majority of Portfolio users.



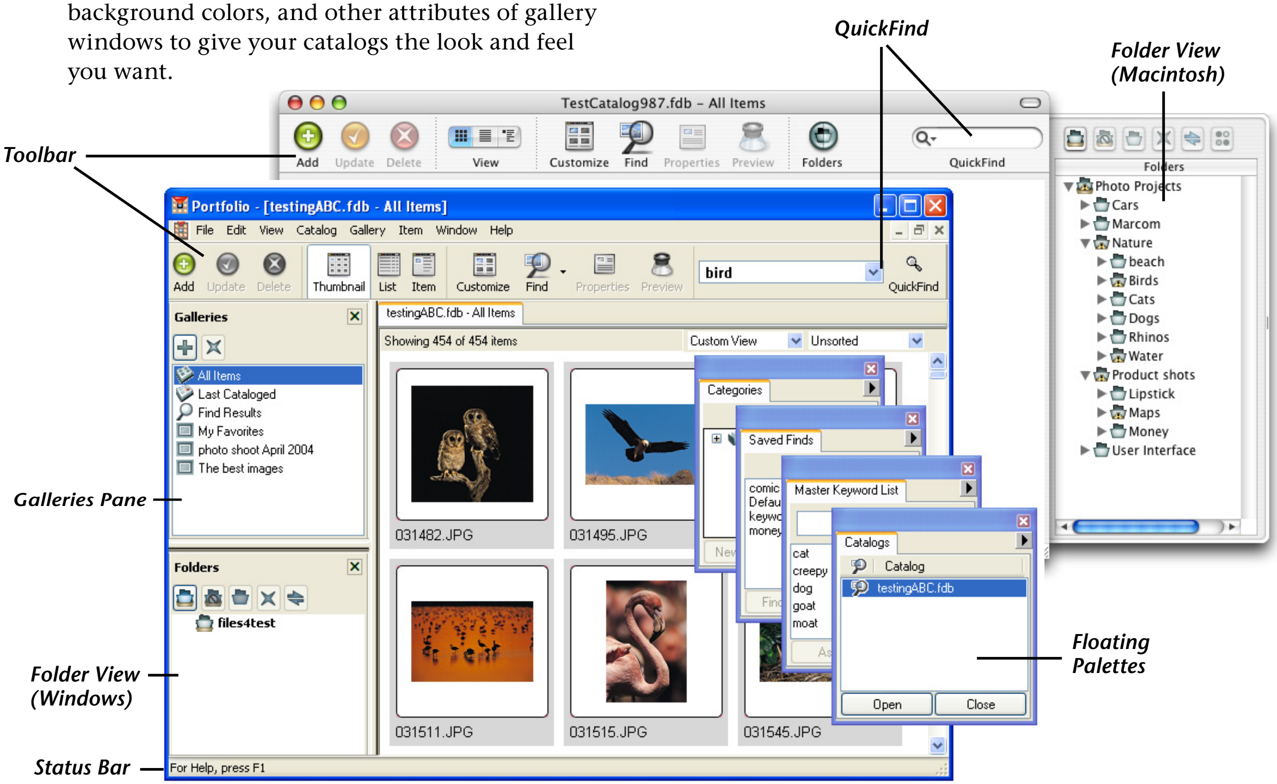

#### Sorting Language

Sets the sort tables that are used for a catalog. If you create a catalog for a language other than English, change the language here so that values will sort properly in that language.

# Customizing Portfolio Catalogs

One of Portfolio's strengths is its ability to display many different views of your files. You can view large or small thumbnails, full-size previews, or simple text-based lists of your cataloged images. You can create views that display many file details, or just the basics. You can change the fonts, background colors, and other attributes of gallery windows to give your catalogs the look and feel you want.

This chapter shows you how to completely customize the Portfolio environment to create catalogs and galleries that are styled and tailored to your exact needs.



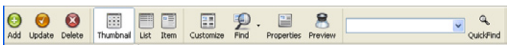

**The Portfolio environment**

## The Portfolio environment

Portfolio offers an extremely flexible working environment, with many options for configuring and controlling the program's main components. Here's an explanation of each part of the main Portfolio window.

### Toolbar

Contains buttons for several of Portfolio's main functions. You can customize which buttons appear on the toolbar a few of which include Slideshow, Email, Burn to Disc and Create Webpages. You can also include buttons on the toolbar to switch between Portfolio's three main views: Thumbnail, Item and List.

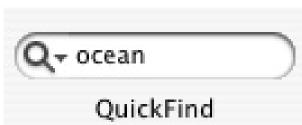



**To customize the toolbar:**

- Choose View > Customize Toolbar.

### QuickFind

One of the Toolbar's most powerful features is the QuickFind field. You can search for items in the current gallery based on information in any searchable field simply by typing a string of text in the QuickFind field and pressing Return.

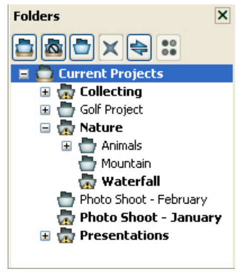


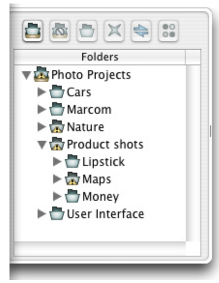

**To configure the QuickFind panel:**

- Choose Edit > Preferences.

### Folder View

The Folder View allows you to display actual hierarchical folders from your computer system or your network within Portfolio. You can create, move and delete folders on your system, and move files into and out of them, without ever having to switch to the Finder (Macintosh) or Explorer (Windows). On a Macintosh the Folder View is displayed in a drawer off the side of the main window. In Windows, the folder view is a pane in the main window.




Folder View also lets you easily synchronize the contents of any folder on your computer or network with your Portfolio catalogs. For much more on using Folder View and FolderSync see the FolderSync section of this guide.

### Status Bar

In the Windows version of Portfolio, you can hide or show the gray Status Bar that runs along the bottom of gallery windows by activating or deactivating the Status Bar command in the View menu. On the Macintosh, there is no Status Bar displayed along the bottom edge of galleries, and no corresponding command in the View menu.

## Palettes

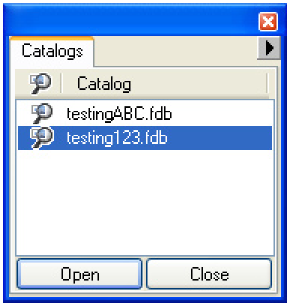
Portfolio uses a system of floating palettes to display and access information when you're working with Portfolio catalogs. Each of these palettes can be hidden or displayed by using the corresponding Show or Hide commands in the Window menu.

In Windows, any combination of these palettes can be docked together to form a single, tabbed palette by clicking at the top of the palette, dragging and dropping one on top of the other.

The available palettes (and their corresponding functions) are:

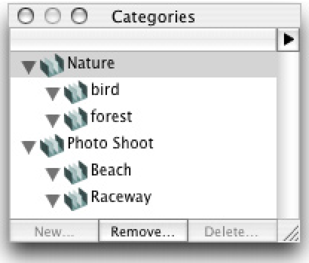
### Catalogs

Displays a list of all catalogs you currently have open, allowing you to easily switch between them. The palette also lets you specify which catalogs will be searched when performing a Find in multiple catalogs.




### Categories

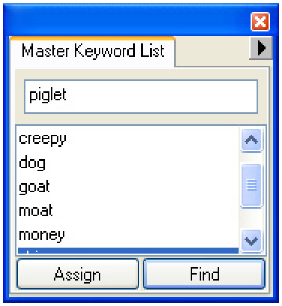
This palette allows you to organize your files into hierarchical categories and subcategories. The folders displayed in the Categories palette aren't "real" folders on disk; they're just virtual folders within Portfolio that allow you to organize groups of items visually.




***If you want to use portfolio to group your images into real folders on your hard drive or your network, use FolderSync instead of Categories.***

### Master Keywords

If you have administrative access to Portfolio, you can set up a list of master keywords that can be used to organize, group, and categorize the items in your catalog.



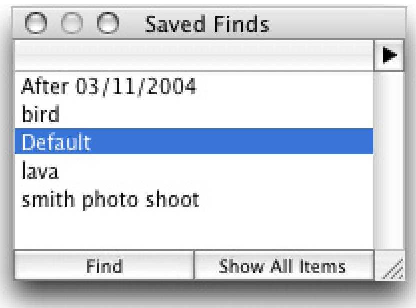
**To define Master Keywords:**

1. Choose Catalog > Access Level
2. Log in with an Administrative password.
3. Choose Catalog > Administration.
4. On the Keywords tab, click Add to add new keywords to the master keyword list.

Once you've set up Master Keywords, you can assign them to items using this palette, and retrieve keyworded items using the palette's Find command.

### Saved Finds

When you search for files with the Find command, you can save the parameters of your search for future use. The Saved Finds palette allows you to quickly execute a saved find by double clicking on it.




### Custom Field Palettes

If, as the administrator of a Portfolio catalog, you've defined any custom fields that contain pre-defined values, each of these value lists can be opened as a palette from which you can both assign values to items and find items that containing those values.

## The Scripts menu

Portfolio offers extensive scripting support via AppleScript on the Macintosh and via scripting languages such as Visual Basic, Visual C++, Java or any other scripting language that can be used to access OLE Automation.

The Scripts menu appears in Portfolio only when valid scripts of the types described above are placed in a folder named "Scripts" located in the same folder as the Portfolio application. Scripts and applications located in the Scripts folder are added to a new Scripts menu and are available as regular menu commands. The Scripts menu does not appear until a script is added to the Scripts folder.

Macintosh script files in the Scripts folder must be AppleScript files. Windows script files must be compiled EXE or CMD files to be included on the Scripts menu.

For information and examples on the scripting interface for each platform, refer to the "Scripts" folder on the Extensis CD.

***Extensis Integration and Consulting Services is available to assist in the creation of custom scripts for your workflow. Please contact the Extensis corporate sales for pricing and more information.***

## Background Cataloging

Instead of manually adding items to Portfolio, you can automate the cataloging process by designating "watch" folders or directories that Portfolio will check at designated intervals. New files dropped in these folders are automatically be added to a catalog, and modified files are updated.

### Overview of Background Cataloging

When items are added to the designated "watch" folder, they are cataloged automatically, using the current settings in Cataloging Options (Catalog > Cataloging Options). Only new or modified items are cataloged. You can create as many different automations as you like, and specify a check frequency that the folders are checked in increments that range from 5 seconds to 1 day.

When the Background Cataloging dialog (Catalog > Background Cataloging) is opened, Portfolio verifies the path to the watch folder. If a problem is encountered, an alert icon is displayed next to the automation. The automation cannot be enabled until the path is corrected or changed.

If you're actually using Portfolio while Background Cataloging is turned on, you probably don't want it interrupting your work when it's time for it to do its job. When you check the In the Background option, the cataloging process happens in the background, so files are cataloged while you continue to work on other tasks in Portfolio.

### FolderSync vs. Background Cataloging

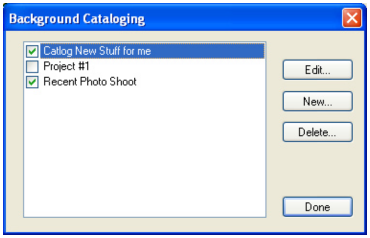
Don't confuse Background Cataloging with the FolderSync feature. Both involve interaction between your Portfolio catalog and the folders and files on your computer or network, but they serve different functions.

Background Cataloging simply automates the cataloging process. It watches a folder and if new files are added to the folder, it catalogs them using the saved cataloging options you specify. Background Cataloging is a one-way street; it brings new items into your catalog, and never removes them.

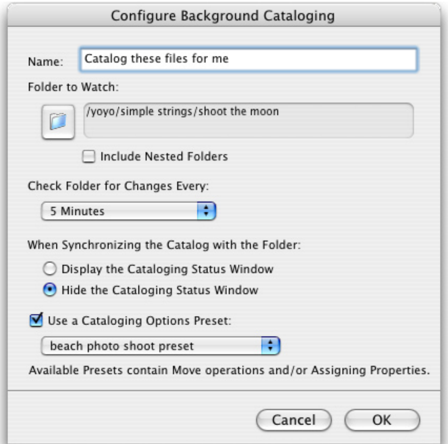
FolderSync also "watches" folders on disk, but it does so in order to display these folders within Portfolio and to help you manage the files they contain. You can use FolderSync not only to add new items to a catalog, but to create, move and delete files and folders right from within Portfolio. FolderSync alerts you to any changes made in "watched" folders, giving you the option of cataloging new items, removing items or updating them — anything needed to "sync" your catalog up with your files on disk.

**To set up a Background Cataloging automation:**

1. Choose Catalog > Background Cataloging.
   The Background Cataloging dialog is displayed.



2. Click New. The Configure Background Cataloging Settings dialog is displayed.




3. Enter a name.

4. Click the Folder button (or Browse button) and specify the folder that you want Portfolio to watch and automatically catalog.

***Do not select the same folder for Background Cataloging and Screen Previews. Doing so will disable Background Cataloging.***

5. Turn on Include nested folders if you want Portfolio to watch (and catalog) any sub folders located within your target folder.

6. From the drop-down menu choose how frequently to check to updates.

7. Choose the radio button to hide or display the cataloging status window. If you choose to hide the cataloging status, you will not be interrupted when Portfolio catalogs new images.

8. If you want to use saved cataloging options, check to enable the option and then choose a saved cataloging option from the drop-down list.

***Only saved cataloging options that are compatible with Background Cataloging are displayed in the drop-down list. Compatible cataloging options can only move the original item or assign new properties to the file.***

9. When you have completed setting up the background cataloging options, click OK.

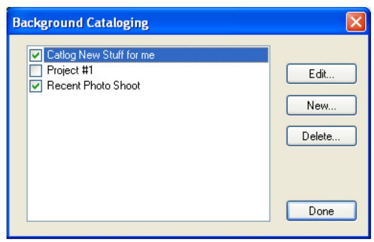
10. Enable background cataloging by clicking to the left of the cataloging name. Active cataloging options appear with a check mark next to them in the Background Cataloging dialog box.

11. Click Done.

**To enable existing Background Cataloging automation(s):**

1. Open the catalog for which you want to enable the Background Cataloging automation.

2. Choose Catalog > Background Cataloging. Portfolio checks the path names for existing background cataloging operations and display an alert icon if any problems are encountered.




3. Place a check mark in front of each automation that you want to enable.

4. Click Done. Portfolio begins checking the Watch folder at the interval specified for the automation.

**To clear an alert icon associated with an automation:**

1. Select the automation on the list, then click Edit.
2. Click the Folder (Mac) or Browse (Windows) icon and relocate the appropriate Watch folder.
3. Click Done to close the Configure Background Cataloging Settings dialog box.
4. Reopen the Background Cataloging dialog (Catalog > Background Cataloging) and verify that the alert icon is no longer present.

***Reopening the Background Cataloging dialog forces Portfolio to recheck the path. If the dialog is not reopened, Portfolio has no way of knowing that a correction has been made.***

## Catalog Properties

You can view general information and statistics about any catalog by choosing Catalog > Properties to open the Catalog Properties dialog box. Here's what you can do with the Catalog Properties dialog box:

- ***Get details such as the total number of items in your catalog, total number of keywords used, catalog size on disk, creation date, and so on.***
- ***View and copy the path to the catalog file on disk.***
- ***View all the keywords used in the Catalog, along with their frequency. To do this, select the Statistics tab, then click the Calculate (Mac) or Calculate Now (Windows) button. Portfolio lists each keyword and indicates how many cataloged items have each keyword assigned.***
- ***Save all the keywords used in a document to a text file. First click the Calculate button to generate the keywords list. Then click Export Keywords (Mac) or Save Keywords to File (Windows) to save the list as a text file.***

### Setting a catalog to open at startup

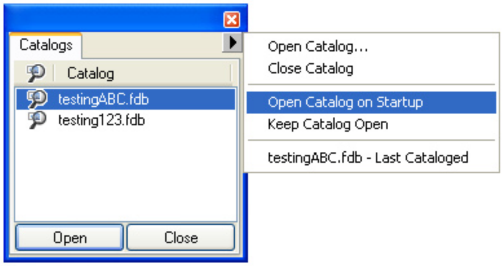
You can select one or more catalogs to open automatically each time you start Portfolio.

**To set up a catalog to open on startup:**

- With the catalog open, choose Catalog > Open on Startup.

— or —

- Open the Catalogs palette (Window > Show Catalogs). Highlight the catalog in the list, then choose Open Catalog on Startup from the palette fly-out menu.




A check mark appears beside the menu command indicating that this catalog will be opened automatically when Portfolio is launched. By turning this setting on in various Portfolio catalogs, you can have multiple catalogs open automatically each time you launch Portfolio.

To stop a catalog form opening at startup, select the Open on Startup command again to remove the check mark.

### Setting a catalog to stay open

Normally, a Portfolio catalog is automatically closed if you close all of its gallery windows. But you can force a catalog to stay open, even if all of its windows are closed. This allows you to search across multiple catalogs without needing to have any gallery windows open.

**To keep a catalog permanently open:**

1. Open the Catalogs palette (Window > Show Catalogs).
2. Highlight the desired catalog.
3. From the Catalog palette fly-out menu, choose Keep Catalog Open.

## Organizing files into Galleries

In order to understand your options when customizing Portfolio catalogs, it's important to understand the relationship between catalogs, galleries and views.

### Catalogs

A catalog is the entire database containing all the items you've cataloged using Portfolio.

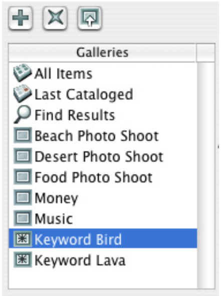
### Galleries

A gallery can display all of the items in your catalog — or a subset of them. Suppose you have 5,000 images in your catalog. Using one of Portfolio's search tools, you locate all images tagged with the keyword "Ocean" and find 135 matching images. In this case, you have a catalog of 5,000 images, but a gallery of 135 images.

A gallery is a good way to organize and view only certain files within your catalog. A photographer may create a catalog of his entire body of work, but have one gallery that displays only portrait photos, and another gallery that contains landscape photos.

You access galleries from the Galleries pane of the main window. The results of the Find command, a gallery containing all items in your catalog, as well as a list of the most recently cataloged items are all easily accessed from the galleries pane.

With a single click on a gallery name, that gallery is opened and displayed in the main window. Double-click the name and on a Macintosh the gallery is opened in an entirely new window. In Windows, a double-click opens the gallery within the main window - you can still access other open galleries by clicking on the tab in the main window for other gallery.




How each item is displayed within a gallery is defined by a View. To find out how to set up a views, see the Views section later in this chapter.

The Last Cataloged gallery displays the files that you most recently cataloged. For catalogs shared with Portfolio Server, Portfolio displays only the files that in the catalog were cataloged by current user.

***You must have a username set on the General tab of the Preferences dialog box, otherwise Portfolio displays all files with the most recent recent date and time in the Last Cataloged gallery.***

**To create a new gallery:**

*Creating multiple galleries has no effect on the number of items in your catalog; galleries are simply different windows into the same catalog.*

1. Choose Gallery > New or press ⌘-G (Mac) or Ctrl-G (Windows). Alternatively, in the Galleries pane click the New button.
2. On a Mac, enter a name in the dialog box and click OK. In Windows, enter a name in the Galleries pane and press the Enter key.

*There is no need to "save" your gallery - galleries are automatically saved, so you never need to worry about saving them.*

**To add items to a gallery:**

Fill your new gallery with the items you want to include in it. There are several ways to do this:

- Drag thumbnails from another gallery into the new gallery.
- Use the Edit menu's Copy and Paste commands to copy and paste thumbnails from another gallery into the new gallery.
- Use the Edit menu's Cut and Paste commands to cut items from one gallery and move them into the new one. (Remember, cutting items from a gallery doesn't delete them from the catalog; it just removes them from the current gallery.)
- Perform a search for a selected set of items — such as those containing a particular keyword. Choose Gallery > Save As to create a new gallery that contains the find results.

**To delete items from a gallery (without removing them from the catalog):**

When items are deleted from a gallery, they are removed only from the current gallery, not from the catalog. If you have created a gallery of a set of images and find that it contains a few images that you don't want to display with the others, simply delete the ones you don't want in the gallery.

1. Select the item(s) that you want to delete.
2. Click the Delete button on the Toolbar.
3. Select the Delete from Gallery radio button in the dialog box, then click OK.

— or —

2. Choose Item > Delete.
3. In the Confirm Delete dialog box, choose Delete from Gallery, then click OK.

— or —

2. Choose Edit > Cut. You can also press ⌘-X (Mac) or Ctrl-X (Windows).

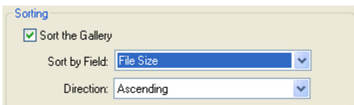
   The selected item(s) will be deleted from the gallery window, but not from the catalog.

### To automatically sort a gallery:

A gallery can be automatically sorted on any field name in the Portfolio database.

***Setting a default sort overrides the sort menu in the upper right corner of the gallery window.***

1. Open the gallery to sort.
2. Choose Gallery > Settings.
3. In the Sorting group box, check the option to Sort the Gallery.



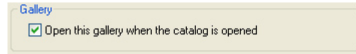

4. Choose a Sort by Field, and sort direction from the drop-down menus.
5. Click OK.

When you first open this gallery, the items are automatically sorted using the specified sort order. The items stay sorted with the assigned sort method until you choose a new a new sort from the drop-down menu.

### To set a gallery to open at startup

You can designate that a specific gallery is displayed when the catalog is initially opened.

1. Open the chosen gallery.
2. Choose Gallery > Settings.
3. In the Gallery Options dialog box, check the option to Open this gallery when the catalog is opened.




4. Click OK.

   The specified Gallery will open automatically whenever this catalog is opened.

### To rename a gallery:

1. In the galleries pane, click to highlight the gallery name.
2. Click the highlighted gallery name again to edit the gallery name, just as you would do in the Macintosh Finder or Windows Explorer.

### To copy a gallery:

1. In the galleries pane, click to highlight the gallery name.
2. Choose Gallery > Save As.
3. Enter a new gallery name and click OK.

   The new gallery is added to the gallery list and contains all of the same items as the previous gallery.

### To delete a gallery:

1. On a Mac, in the galleries pane Ctrl-click the gallery name and choose Delete from the menu.

   In Windows, right click the gallery name and choose Delete from the menu.

2. Click OK to confirm the deletion of the gallery.

**To create a smart gallery:**

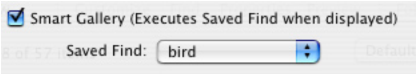
A smart gallery is one that automatically performs a saved find each time it is opened.

*In order to create a Smart Gallery, you must have already created at least one Saved Find. For more information, see the chapter on Finding files with Portfolio.*

1. Open the chosen gallery.

2. Choose Gallery > Settings.

3. In the Gallery Options dialog box, check Smart Gallery option.




4. Choose your saved find from the drop-down menu.

5. Click OK.

Each time your Smart Gallery is opened, the items will be searched and selected using the Find criteria in the Saved Find that you designated in step 4.

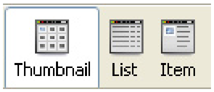
# Views

One catalog can contain multiple galleries, and each gallery can be displayed using many different saved views.

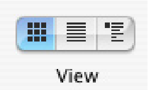
You can easily define the attributes of the display — background color, fonts, font color, thumbnail size, grid spacing, and field data— and then save these settings to a Saved View.

## Thumbnail, List and Item Views

There are three main "types" of views available in Portfolio, each of which can be customized to create any number of unique saved views. After you choose a view type, customize it and save it to a saved view. You can then apply that view to any of your galleries.



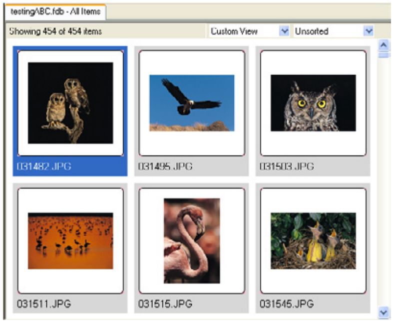

*Windows buttons*




*Macintosh buttons*

### Thumbnail view

Thumbnail view, the default view in Portfolio, displays your cataloged items in an adjustable grid of small thumbnail-sized previews. Information about each cataloged item appears under each thumbnail.

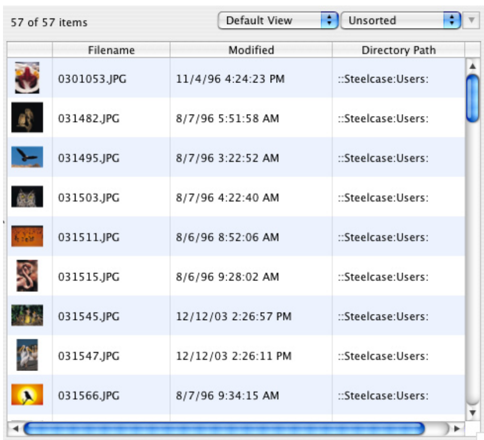


You can switch to Thumbnail view by clicking the Thumbnail View button on the Toolbar or by pressing ⌘-T (Mac) or Ctrl-T (Windows).

You can choose to display the contents of any Portfolio fields under the thumbnails. Choose the View > Customize command, to choose from four different sizes of thumbnails, select the font, size, formatting and data fields to display.

### List view

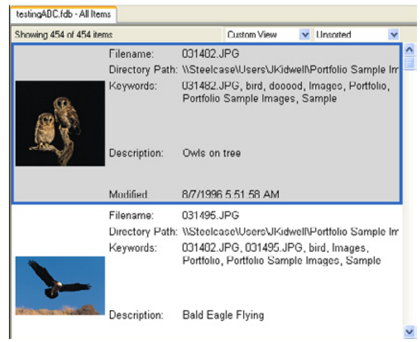
List View displays the information you have stored in your Portfolio catalogs in a spreadsheet-style list format. By default, fields such as the file size and type, modification, and volume are listed, but this set of fields can be edited with the View > Customize command, where you can specify exactly what field information you want to appear in the columns of the list.




To switch to list view, click the List View button on the main Toolbar, or by press ⌘-L (Mac) or Ctrl-L (Win).

### Item view

Item View allows you to view each cataloged item along with any stored data associated with it. In this view, you can see the list of all the keywords associated with a file, for example, or view an entire description, along with any other custom field data you may have entered. Choose Item View when you want to access numerous details about a set of items without having to open and view the properties of each item one at a time.

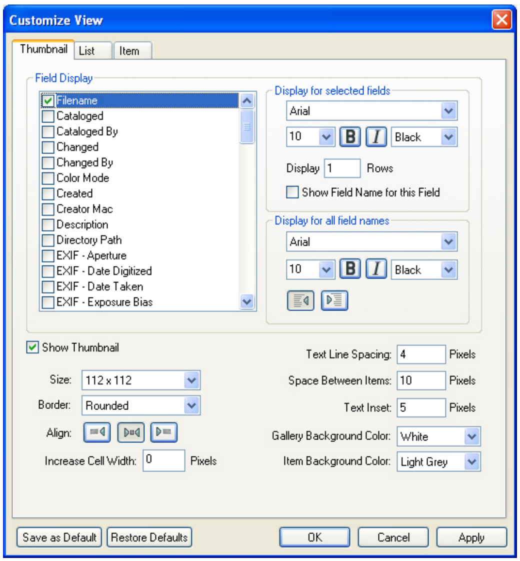



The fonts, colors, thumbnail sizes, etc. of item views can also be customized, as outlined in the “Customizing Gallery Views” section below.

Switch to item view by clicking the Item View button on the main Toolbar, or by pressing ⌘-R (Mac) or Ctrl-R (Win).

## Customizing Gallery Views

To customize thumbnail, list and item views, choose View > Customize (⌘-D on Mac; Ctrl-D on Windows) .




### Field display

In all three types of views — Thumbnail, List and Item — you can choose exactly which data fields are displayed on screen and the field formatting. You can also determine the order in which those fields are displayed.

Simply check the fields you want included in a view from the scrolling list of fields in the Customize View dialog box.

**To show or hide fields:**

- In the Field Display list in the Customize View dialog box, select the fields you want to show. A check mark to the left of each field name indicates that a field is activated; click in the check mark column to toggle fields on or off.

**To change the order of fields:**

- Click and drag the field names in the list into the order you want.

**Controlling the display of multi-line fields**

Some fields, such as Description and Keyword, can consist of multiple rows of text. When customizing a item view, you can control how many rows of text will be displayed on screen without scrolling.


### Field formatting

You can choose the font type, size and field name for each field. Each field can have a unique formatting, giving you the flexibility to be creative with your view settings.

**To change the field formatting:**

1. In the Customize View dialog box, click to highlight a field name.

2. Choose a font, font size and type from the drop-down lists.

**To display the field name:**

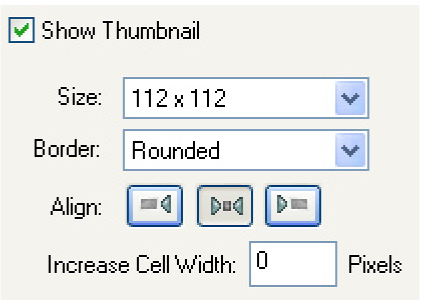
- To display a field name in your view, click to highlight the field name and then check the Show Field Name for this Field option.

  This displays the field name in your saved view, for example "Filename:  bunny.jpg"

## Thumbnail options

**(available in Thumbnail and Item views only)**

Choose from four different standard sizes, from 32 pixels by 32 pixels up to 256 pixels by 256 pixels. Note that Portfolio can't display thumbnails that are larger than the ones you generated when you first cataloged your files. By default, Portfolio generates thumbnails that are 112 by 112 pixels, so if you want to display 256 x 256 thumbnails in your catalogs, you must set the Thumbnail size to the higher setting in the Advanced Cataloging Options dialog before items are cataloged, as explained earlier in the previous chapter.




To generate larger thumbnails for items already cataloged, set the Advanced Cataloging Options the way you want, then choose Item > Regenerate Thumbnail to force Portfolio to build new thumbnails.

## Border

**(available in Thumbnail and Item views only)**

You can apply a graphic border, or frame, around each thumbnail to give your Portfolio catalog a unique look. To apply a border, choose one of the pre-defined borders from the Border drop-down menu. You can also create your own borders in any graphics application.

### Creating new borders

You can create a custom border from any bit-mapped image, such as a PICT, TIFF or BMP file. Create the border in a graphics program such as Photoshop, then simply copy and paste the border into Portfolio to apply it in a custom view.

**To add a custom border:**

1. Create the border in a graphics application.

   To create borders that fit nicely around the thumbnails, follow the pixel dimensions shown in the following table:

   | Thumbnail size | Border size |
   |---|---|
   | *32 x 32* | *40 x 40* |
   | *64 x 64* | *80 x 80* |
   | *112 x 112* | *140 x 140* |
   | *256 x 256* | *320 x 320* |

2. Set the transparency color of the border.

   Portfolio looks at the center pixel of your border image and sets that as the designated transparency color. Any part of your border that is the same color as the center pixel will appear transparent. This allows you to create borders that allow portions of the background color to show through. If you don't want

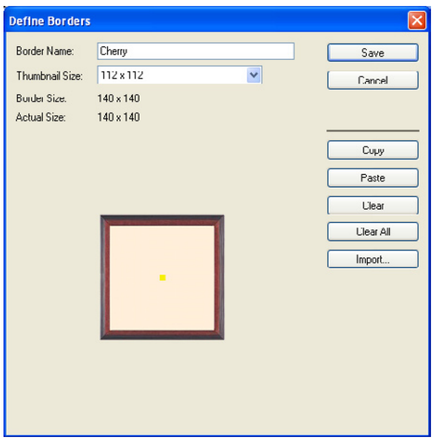
the background color to show through any portion of your border, make sure the center pixel is a color that isn't used anywhere else in your border design.

3. Copy the finished border image to the clipboard in your graphics program.

***If you've edited the image in a program such as Photoshop, make sure you've flattened the final image and that you're copying the whole image, not just a single layer of it.***

4. Paste the new border into Portfolio.

   Open the Customize View dialog box if it's not already open (⌘-D on Mac, Ctrl-D on Windows) and from the Border drop-down menu choose Edit. Click New to open the Define Borders dialog box. Then, click Paste to paste the border image.




   Alternatively you can save the border image from your image-editing program as a standalone PICT, TIFF or BMP file, and then import the border into Portfolio using the Import button in the Define Borders dialog box.

5. Name the border and save it. Type a name into the Border Name field and click Save. Click OK in the Borders list to return to the Customize Gallery dialog box.

6. Apply the border to a view. Choose your newly-saved border from the Border menu and click Apply.

***Border files saved into the Borders folder in the Portfolio directory will be included in all new catalogs that you create.***

### Copying and pasting borders

You can copy custom borders from one Portfolio catalog to another, allowing you to transfer your favorite borders into a new catalog.

**To copy a border to another catalog:**

1. Open the Customize View dialog box (⌘-D on Mac, Ctrl-D on Windows) and from the Border drop-down menu choose Edit.

2. Select the border you want to copy from the saved borders listed in the Borders dialog box. Click Edit.

3. In the Define Borders dialog box, click Copy to transfer the border image to the Clipboard.

4. Paste the border. You can paste the border into another catalog (as outlined in the "Creating a new border" section above) or into an image-editing program in order to modify it.

## Displaying items in a gallery as a list

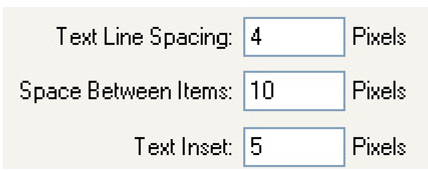
### (Item view only)

In an Item view, choose this option to display more than one item on screen at once.


When this option is disabled, only one item is displayed in the gallery window at a time. When you scroll down in the gallery, the next item in the gallery is displayed.

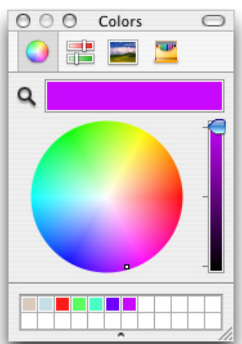
## Spacing

You can control the spacing between thumbnails, lines of text, item rows and even how far the text is inset from the edge of the item. The type of settings available vary by the type of view selected, and are always entered in pixel values.



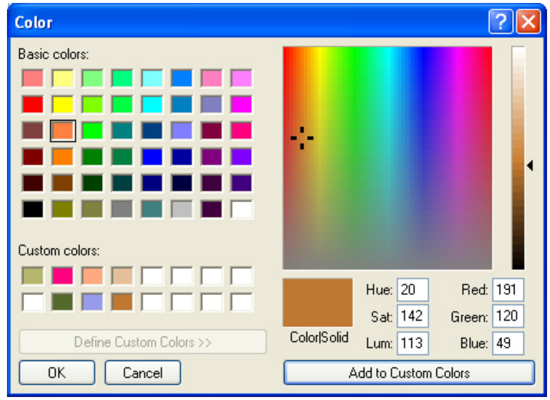

## Colors

You can choose the color of various items in your gallery - the gallery background, the item background, row colors as well as text colors. Choose from a number of default colors, or you can define a new color.




**Mac:** Click the color swatch to open the standard Mac color picker and select the color you want then click OK.

**Windows:** Choose one of the pre-defined colors from the color drop-down menus, or choose Other from the menu to use the standard Windows color picker to define a new color, then Click OK.




## Default settings

You can assign your current view settings as the new default view for a catalog, so that each time a new gallery in that catalog is created, it uses that view. These saved settings are called default settings, and can be customized in any way that you wish.

**To save the current view as the default:**

1. Choose View > Customize to open the Customize View dialog box.

2. Click the Save as Default button (in the lower left corner).

***When you save the default settings, they are saved for all of the Thumbnail, List and Item types.***

**To load the default settings:**

1. Choose View > Customize to open the Customize View dialog box.

2. Click the Apply Defaults button. This loads the default settings into the Customize View dialog box.

3. Click OK to apply the default settings.

## Saving and applying your customized views

Once you've customized your view — changing fonts, background color, border, hiding or showing various fields, and so on — you can save all these attributes as a saved view. You can then apply this view to any gallery in your catalog at any time, using the Saved Views menu. Several pre-defined saved views are included as part of Portfolio's default catalog configuration.

**To save a view:**

1. Use the Customize command (as described in the previous section) to set up a view exactly as you want it and apply your settings to the current gallery window.

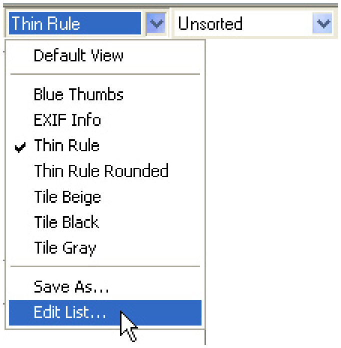
2. Choose Save (or Save As) from the Saved Views drop-down menu, which is to the left of the Sort menu on the status bar that runs along the top of the gallery window.

3. Name the view and click OK.

4. The name of the saved view now appears in the Saved Views menu.

**To apply a saved view:**

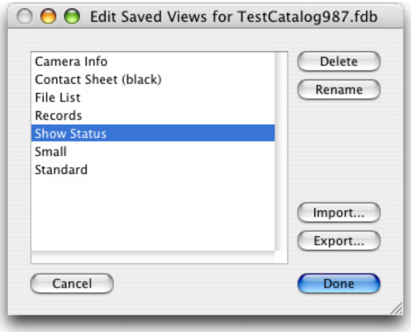
1. Choose the view by name from the Saved Views menu.




**To rename or delete a saved view:**

1. Choose Edit List from the Saved Views menu.

2. Select the view that you want to rename or delete from the list, then click the Rename or Delete buttons.



# Managing files with Portfolio

Once you've created a Portfolio catalog and filled it with your own digital files, there are many tools at your disposal that make it easy to view, organize and manage your work. This chapter tells you how to use Portfolio to handle the following tasks:

- *Preview images, audio and video clips and other documents*
- *Get detailed information about each file*
- *Edit original files*
- *Rotate images*
- *Batch convert files to a new file format*
- *Rename files*
- *Keep your catalog up to date*
- *Easily drag cataloged files to another program*
- *Print images in a gallery*

## Previewing & Editing Files

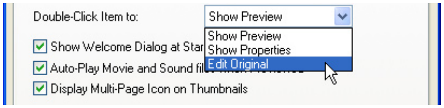
Portfolio can directly open most image, movie and sound files, allowing you to quickly preview cataloged items. This saves you from having to launch the programs that were used to create the items in order to view them.

*Some file types cannot be previewed. If Portfolio is unable to preview a file, a prompt appears asking if you want to view the file using the program that created it.*

**To preview an item:**

- *Double-click a thumbnail in any gallery window.*
- *Double-click any item listed in a List View*
- *Select the item, then press ⌘-Option-I (Mac) or Ctrl-Alt-I (Windows)*
- *Double-click a thumbnail in an Item Properties window.*
- *Control-Click (Mac) or Right-click (Windows) a thumbnail, and choose the Preview Original command from the menu.*

*By default, Portfolio previews a file when a thumbnail is double-clicked, but you can have it open the Item Properties window or edit the original file with a double-click instead by changing this behavior in the User Preferences dialog box. Choose Edit > Preferences (Windows) or Portfolio > Preferences (Mac) and on the General tab set the result of a double-click to Show Preview, Show Properties or Edit Original.*




If you enabled screen previews for your catalog, Portfolio displays the screen preview when you preview a file.

Otherwise, Portfolio must be able to locate a file in order to preview it. If the original file that was cataloged cannot be found, Portfolio prompts you to find the missing file. If the cataloged file was on a removable disk, such as a CD or DVD, Portfolio prompts you to insert the missing disk.

*If you want Portfolio to be able to show previews of images that are offline (on a CD or DVD that is on the shelf, for example) you must use the Screen Previews feature.*

## The Preview Window

The Preview window has buttons that allow you to:

 Zoom in

 Zoom out

 Fit the image to the size of the Preview window

 Delete the image from your catalog

 Switch to the original file

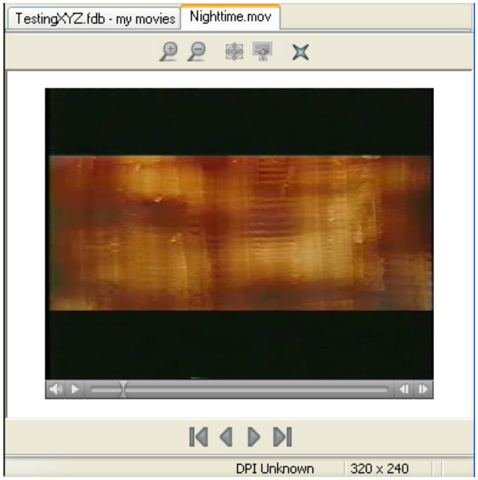
The Switch to Original button is active only if you're using Portfolio's Screen Previews feature. Clicking it replaces the Portfolio JPEG screen preview image with the original source file.

If you preview more than one file at a time, navigation controls allow you to page from one file to the next or jump to the first/last file.

In a similar fashion, if you are previewing a multi-page document, such as a PowerPoint document or PDF file, the preview window also has standard navigation controls that allow you to move from page to page within the document.

## Previewing audio/video files

When you preview audio or video files, a standard QuickTime control bar appears in the Preview window, allowing you to play back the audio or video content. By default, playback begins automatically when you open a preview window.

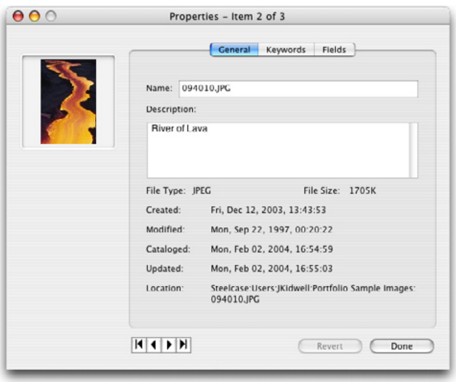



If you don't want audio and video files to play back automatically when you preview them, choose Edit > Preferences (Windows) or Portfolio > Preferences (Mac) and on the General preferences tab turn off the "Autoplay Movie and Sound files when Previewed" option.

## Getting information about your files

Portfolio stores very detailed information about every file that you catalog. This information includes data that Portfolio itself collects during cataloging, such as each file's creation date, file size, image dimensions, file type, and so on. It also includes metadata information that you may add to a Portfolio item, such as a description, keywords, or other data that you may add using custom fields.

All of this information is available in the Get Info/Properties window. To open Item Properties, select a thumbnail and click the Get Info/Properties button on the toolbar, or press ⌘-I (Mac) or Alt-Enter (Windows). Switch between the General, Keywords, and Fields tabs to view the details for each file.




*You can make Item Properties open by default when you double-click a thumbnail. To do so, choose Edit > Preferences (Win) or Portfolio > Preferences (Mac) and on the General tab set the results of a double-click to Show Properties.*

### Item Properties navigation buttons

The four navigation buttons at the bottom of the Item Properties window — First, Next, Previous, and Last — allow you to navigate between selected items. This makes it easy to access information about a series of items, without having to repeatedly open and close the Item Properties window.

You can also navigate from item to item in Item Properties using the following keyboard shortcuts:

| To do this... | Press this shortcut... |
|---|---|
| *Move to next item* | *Windows: Ctrl-⇨*<br>*Mac: ⌘-⇨* |
| *Move to previous item* | *Windows: Ctrl-⇦*<br>*Mac:⌘-⇦* |
| *Toggle between General, Keywords and Fields tabs* | *Windows: Ctrl-Tab* |

## Editing information using Item Properties

The Item Properties window isn't just for getting information. You can also use this window to edit Portfolio items. You can add a description, rename files, add keywords and fill in custom fields using Item Properties. See the chapter on Organizing your Files with Portfolio for details on how to use Item Properties to edit items.

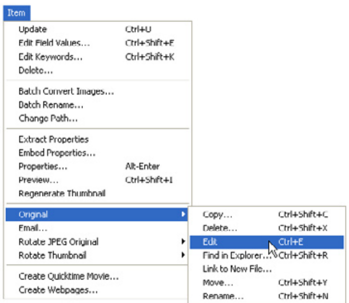
## Editing original files

You can jump directly from Portfolio into any other program in order to edit your cataloged files.

**To edit a file:**

1. In any Portfolio gallery, select the item you want to edit.

2. Choose Item >Original > Edit, or just press ⌘-E (Mac) or Ctrl-E (Windows).




3. Portfolio launches the program needed to edit the original file and opens the file in that program.

   Portfolio generally remembers the name and location of the program last used to edit any particular type of file. If necessary (such as the very first time you attempt to edit a file of a particular type) you'll be prompted to choose an application. Portfolio will remember the choice in the future.

***If you frequently use Portfolio to edit original files, you might want to configure the program's preferences so that double-clicking a thumbnail opens the original for editing instead of previewing. Choose Edit > Preferences (Windows) or Portfolio > Preferences (Mac) and on the General tab, set the result of a double-click to Edit Original.***

## Moving, copying and deleting files

You can move, copy, rename, and delete your original files, all from within Portfolio. All of the actions that you perform on your original files can be accessed from the Original submenu in the Item menu.

**To copy a file:**

1. In any Portfolio gallery, select the items you want to copy.

2. Choose Item > Original > Copy

3. In the dialog box, choose a destination folder for the copied item(s), then click Choose (Mac) or OK (Windows).

4. Portfolio copies the file(s) you selected to the folder you specified. The original files remain untouched.

**To move a file:**

1. In any Portfolio gallery, select the items you want to move.

2. Choose Item > Original > Move

3. In the dialog box, choose a destination folder for the moved item(s), then click Choose (Mac) or OK (Windows).

   Portfolio moves the original file(s) to the new folder location you specified and updates the catalog, automatically recording the new location of the cataloged items.

***Copying items has no effect on your catalogs. Moving a file, however, updates it in Portfolio, with the path now pointing to the file's new location.***

## Batch converting images to a new file format

Portfolio has the power to batch convert images from supported file formats into JPEG, TIFF, PixelLive or PixelSafe format. When converting files to JPEG or TIFF format, you can change the image resolution, size, color mode, location on disk, and also automatically add the converted files to disk. When converting to PixelLive or PixelSafe, you can change the color mode, location on disk and password protection. Portfolio supports converting images that are originally in the following file formats: BMP, EPS, FPX (FlashPix), GIF, Illustrator, JPEG, PCD (Photo CD), PSD (Photoshop), PICT, PNG, RAW (for supported camera file formats), TGA (Targa), TIFF and WMF (Windows version only). Files in PixelLive and PixelSafe format can only be converted to PixelLive or PixelSafe format. .

***Embedded metadata is transferred to the new file when supported by the new file format. Note that embedding EXIF metadata into TIFF files is not currently supported.***

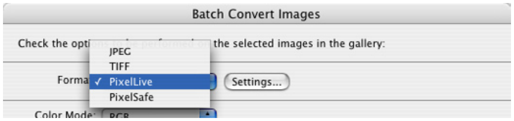
**To batch convert a group of images:**

1. Select the item(s) you want to batch convert.

   You can select an individual thumbnail or select multiple thumbnails. (To select multiple thumbnails, hold down the ⌘ key (Mac) or Ctrl key (Windows) while clicking on each selection.

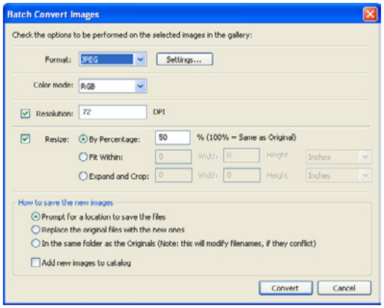
2. Choose Item > Batch Convert Images

3. In the Batch Convert Images dialog box, choose the destination file format.




   If you choose JPEG, PixelLive or PixelSafe, click Settings to set the compression rate or quality level.

4. Choose a color mode from the drop-down box.




5. To change the image resolution, check the Resolution option and specify a new DPI.

6. To change the image size, check the Resize option and then specify how you want to determine the new size:

   - ***By Percentage - scales from 1% to 1600%.***
   - ***Fit Within - this option proportionally scales the image to fit within the chosen height and width.***
   - ***Expand and Crop - this option expands the image to fit all four sides of the new area while maintaining the original aspect ratio. Equal parts of the image are cropped from the sides that extend past the defined area.***

7. Choose how to save the new images:

   - ***Prompt for a location - when you click Convert, Portfolio prompts you to specify a directory.***
   - ***Replace the original files with new ones.***
   - ***In the same folder as the Originals - If the new file extension causes the files to be named the same as current files, the files are renamed appropriately. For example "bunny.jpg" would become "bunny1.jpg".***

8. Check the Add New Images to Catalog option if you want to add the converted images to the current Portfolio catalog.

*You must have Administrator or Publisher access level to add the new images to the catalog.*

9. Click Convert.

*When converting to the PixelSafe format, you are prompted for a user name and password. Don't lose this information – it will be required each time you access the new PFZ files.*

## Rotating images

Portfolio can rotate JPEG images, making it easy for you to switch your digital photos from portrait to landscape orientation (or vice versa) without having to open and edit the files individually. This is especially useful if you've cataloged a number of photos from a digital camera and have a combination of horizontally or vertically aligned photos that need to be adjusted.

**To rotate a JPEG image:**

1. Select the item(s) you want to rotate.

   You can select an individual thumbnail or select multiple thumbnails. (To select multiple thumbnails, hold down the ⌘ key (Mac) or Control key (Windows) while clicking on each selection.

2. Choose Item > Rotate JPEG Original and select one of the three submenu options: 90 degrees clockwise, 90 degrees counterclockwise, or 180 degrees.

3. A progress dialog appears as each item is rotated.

*For quicker image rotation, you can press ⌘-] (Mac) or Control-] (Windows) to rotate a selected image clockwise, and Command-[ (Mac) or Control –[ (Windows) to rotate a selected image counterclockwise.*

*Portfolio rotates JPEG images only. To rotate images saved in other formats, you must open the files in an image-editing program and perform the rotation in the editing application.*

### Rotate Thumbnail only

Portfolio also gives you the option of rotating only the thumbnail of any image, leaving the original untouched. Follow the same procedure outlined above for rotating an original JPEG image, but choose the rotation commands from the Item > Rotate Thumbnail sub-menu instead.

## Renaming Files

Portfolio provides five ways to easily rename the original files that you catalog:

- *You can rename files as you catalog them, using the batch Rename feature in Cataloging Options. This is useful for naming batches of files imported from a digital camera or scanner.*
- *Rename an individual file by selecting a thumbnail and choosing Item > Original > Rename, and typing a new name in the Rename File dialog box.*
- *Select a thumbnail and press ⌘-Option-N (Mac) or Ctrl-Shift-N (Windows), then type a new name in the Rename File dialog box.*
- *Open the Item Properties window for any item in your catalog and to type a new name in the Name field. To open Item Properties, select a thumbnail and click the Get Info button on the toolbar, or press ⌘-I (Mac) or Alt-Enter (Windows).*
- *During a Slideshow, click the Rename button on the Slideshow controller and type a new name in the Rename File dialog box.*

## Linking to a new file

In certain situations, you may want to retain a Portfolio item — including its description, keywords, and other data — but link the item to a completely different file. For example, you might edit an image, then use the Save As command to save the file under a new name. You want Portfolio to point to the new version of the file, but still retain all the information you stored in the old item.

You can do this using the Link to New File command, which lets you hook up any existing item to a different original file.

**To link an existing item to a new original file:**

1. Select the thumbnail of the item you want to re-link.
2. Choose Item > Original > Link to New File.
3. Specify the new file.
4. Portfolio catalogs the file, which is now linked to the existing item in your catalog, and updates the item with any new information (such as the new thumbnail image).

***After linking to a new file, you can embed the metadata in the Portfolio catalog to the new file. See the Setting Up Portfolio chapter for more information about embedding metadata.***

## Removing items from a catalog

Portfolio provides several easy ways to remove items from a catalog. Keep in mind that deleting an item from a Portfolio catalog does not delete the original image; it simply removes Portfolio's internal record about the file. Your original file remains untouched.

***You can delete original files using Portfolio, too. Use Item > Original > Delete. This will remove the item from Portfolio and move the original file to the Trash (Mac) or Recycle Bin (Windows). On the Mac, items on a network volume deleted in this manner will be deleted immediately without moving them to the Trash.***

**To remove an item from a catalog (without deleting the original file):**

- ***Click the Delete button in the Toolbar.***
- ***Choose Item->Delete***
- ***Control-click (Mac) or right-click (Windows) on a thumbnail and choose Delete from the menu.***
- ***Press the Delete key.***

### The Confirm Delete warning

Whenever you delete an item from the All Items catalog, using any of the methods listed above, Portfolio presents a confirmation dialog box to make sure you're performing the action you intended. The dialog gives you the choice of deleting the item from the gallery or deleting it from both the gallery and the catalog.

If you don't want to delete the item from either the gallery or the catalog, click Cancel.

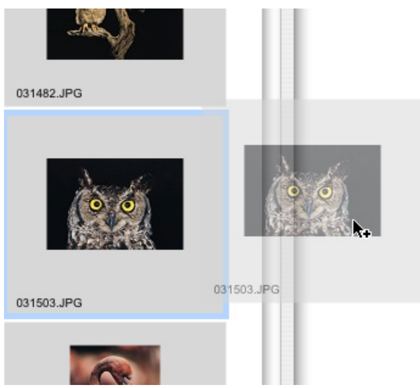
*If you are deleting files from the "All Items" gallery, Portfolio only prompts if you would like to remove the item from the catalog.*

If you meant to delete the original file on disk, click Cancel, and choose Item > Original > Delete instead.

If you don't want the Confirm Delete warning to appear each time you delete an item, in Windows press Ctrl-Delete, or Option-Delete on a Macintosh. this bypasses the warning dialog box.

## Dragging cataloged images into other programs

While Portfolio is the perfect tool for managing and organizing your files, most of your creative work probably happens outside of Portfolio — in other programs that you use to edit images, build documents, create presentations, lay out pages for print publication, develop web content, and so on.




Moving from Portfolio to these other applications is usually a simple drag-and-drop affair. Here are some of the ways that you can easily use Portfolio to work with images in other programs:

- ***Drag a thumbnail into a drag-and-drop savvy document to place a copy of the image in that document.***
- ***Drag a thumbnail on top of an alias (or shortcut) of an editing program, such as Adobe Photoshop®, Illustrator® or Macromedia FreeHand® to open the image with that program.***
- ***Drag a thumbnail to the desktop or a folder window to make a copy of the original file in that location.***
- ***Drag a thumbnail into an email message to send a copy of the image as an attachment.***
- ***On a Macintosh with the Portfolio Quark XTension installed, drag a thumbnail into a QuarkXPress® document to place the image in an XPress layout. If you drop the thumbnail on a picture box, the selected image will be placed in the existing picture box; otherwise, Portfolio creates its own new picture box for the image.***

*On a Macintosh only, dragging thumbnails from Portfolio into QuarkXPress requires the presence of QX-Drag & Drop, an XTension that must be installed in Quark's XTension folder. You must manually copy the Portfolio XTension from the Portfolio CD into the Quark XTension folder, or download the most current XTension from the Extensis website.*

*The Portfolio Express palette provides an even easier way to use your cataloged files in other programs. Like Portfolio, it allows you to drag and drop thumbnails into other documents, but the compact palette floats above other document windows and can be accessed from within any other program with one keystroke. See the Portfolio Express chapter for details.*

## Keeping Catalogs Updated

In order for a Portfolio catalog to be useful, it has to accurately represent the actual files you have stored on your computer and on your network. This requires that you keep your catalogs up to date, so that Portfolio knows the location and status of every file in your catalog.

If you're using FolderSync, as described in the next chapter, keeping catalogs up to date is a breeze. Portfolio automatically watches the folders on your hard drive or network containing your cataloged files and alerts you any time a file is added, moved, deleted or edited. One click of the Sync button brings your catalog up to date with the files on disk. (See the next chapter for full instructions on using FolderSync.)

Even without using FolderSync, Portfolio contains several tools that make it easy to update any item in your catalog.

### Understanding Portfolio's "update" logic

When working with Portfolio catalogs, it's important to understand how Portfolio determines whether a file is a new item (and therefore needs to be cataloged) or is an existing item that simply needs to be updated:

- ***If a file has a filename that does not match any cataloged items, Portfolio considers it new and catalogs it.***
- ***If a file has a filename that matches an existing item, but has a unique location (path), Portfolio also considers it new and catalogs it.***
- ***If a file's name and location both match, Portfolio recognizes it as an item that has already been cataloged. It then looks at the file's modification date. Items with matching modification dates are ignored (because they're identical to the items already in the catalog). Files with different modification dates are updated.***

### Updating files that have changed

Some reasons why you might need to update items in your catalog:

- ***You've moved, renamed, or deleted some of the files, folders and volumes in your catalog.***
- ***You've edited some files and so Portfolio's information about these files (such as size and modification date) is no longer accurate.***
- ***A cataloged image has been modified and the thumbnail in Portfolio no longer matches the actual content of the image.***

Portfolio includes a number of "update" commands that accommodate each of these situations.

#### Updating to change file location

When a file has been moved to a new location — but nothing else about it has changed — you can update it quickly using the Change Path command.

1. Select the item(s) for which you want to update the path.
2. Choose Item > Change Path.
3. The Update dialog box opens, prompting you to find the new location for the designated file.
4. Select the file, then click Select (Mac) or Open (Windows). The item in Portfolio now points to the correct location of the original file.

When you update a file using this method, Portfolio automatically searches for other files that need to be updated in the same directory and offers to update them as well. If you turn on the Search Subdirectories check box in the Update Location dialog box, Portfolio looks for matching files in the subfolders as well.

### Updating path via drag-and-drop

If you know that you've moved some files that are in your catalog, there's an even easier way to update the catalog with the new path information — using drag and drop. This method will work only if you've moved cataloged files to a new location and have not changed the filenames.

1. In the Macintosh Finder or Windows Explorer select the icons of the files that have been moved.
2. Hold down the Option key (Mac) or Control key (Win) while dragging the icons into the Portfolio catalog.

   Make sure you're dragging the files into the same catalog in which they were originally cataloged before they were moved.
3. Portfolio presents a dialog, confirming that you want to update the path of these files.
4. Click OK. Note that this updates the path of the file only — not its thumbnail or any other properties.

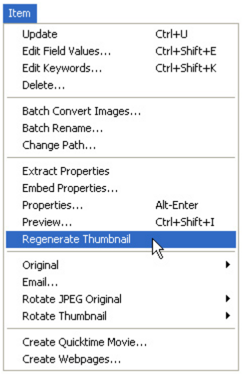
***When you use this method, files are matched by Filename in the Windows version of Portfolio and by Filename and Creation Date in the Mac version. Don't use this drag-and-drop method of updating on Windows unless you are sure you don't have duplicate filenames in your catalog.***

### Updating to Regenerate Thumbnails

This update command simply makes Portfolio re-examine each selected file and build a new up-to-date thumbnail image. It's useful if you originally cataloged items with the 112-pixel thumbnail setting and now would prefer to have 256-pixel thumbnails instead.

***This feature is also valuable for generating (or updating) screen preview files for existing Portfolio records if Generate Screen Previews is turned on in the Previews tab of Catalog Administration — choose Catalog > Administration to change this setting.***

1. Select the item(s) for which you want to generate a new thumbnail.
2. Choose Item > Regenerate Thumbnail.




3. Portfolio re-examines each file and generates a new thumbnail for it.

### Updating Everything

The Update command performs a complete update of each selected item that has been modified since you originally cataloged it, confirming the location of each file (or asking you to find it, if necessary), extracting properties from it, and generating a fresh thumbnail.

***The Update command only updates items that have been modified since they were cataloged (as indicated by a newer modification date).***

1. Select the item(s) you want to update.

   To update all items, from the Galleries pane, open the All Items gallery.

2. Choose Edit > Select All (⌘-A on Mac, Ctrl-A on Windows).

3. Choose Item > Update, or press ⌘-U (Mac) or Ctrl-U (Windows).

   Portfolio searches for each item's source file using the path name stored in the item. If the source file is found, and its modification date is more recent than the one originally recorded in Portfolio, the item is updated. If the source file cannot be found, you are prompted to locate it. If you select a new file for the selected item, the item is updated with information from the new file, based on your current Advanced Cataloging Options settings.

   If the source file cannot be found and you click Skip File when prompted to locate the file, the selected item is left untouched.

## Find Missing Originals

If your files get moved, renamed, or deleted after you catalog them, it's possible for Portfolio to lose track of them. With the Find Missing Originals command, you can easily locate any such "lost" files and then either re-link them to Portfolio — or strip them out of your catalog.

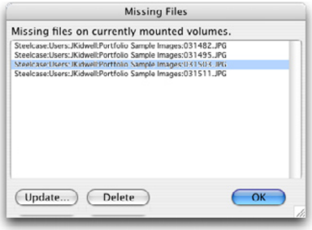
***Portfolio searches for missing files on mounted volumes only. If a volume containing cataloged item source files is not mounted, Portfolio will not report on those files.***

**To check for Missing Files:**

1. Choose Catalog > Find Other > Missing Originals (Win) or Choose Edit > Find > Missing Originals (Mac). You can also press Ctrl-M (Win) or ⌘-M (Mac).

   Portfolio compares each item's path name as stored in the catalog against all mounted volumes and disks to see if the source file can be found at that location. The results are reported in the Missing Files dialog.

2. If Missing Files were located, select each item, then click either the Update or the Delete button at the bottom of the dialog to update the catalog.




   **Update:** Initiates a catalog Update and allows you to manually locate the missing source file.

   **Delete:** Deletes the item from the catalog.

## Printing your catalogs

Although you will typically find and select a catalog item either to edit the source file, view it, or use it in another document, you might want to print from the catalog itself—to show a selection of images to a client, for example, or to evaluate items for possible use in a document.

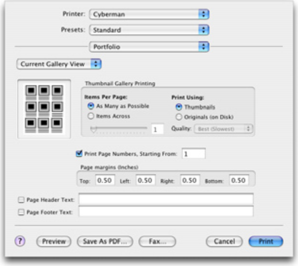
When you customize the view of your galleries on screen, your view settings are also used when you print items from that gallery.

**To print thumbnails or a list of catalog items:**

1. Select the items you want to include and place them into a gallery window.
2. Apply a saved view, or customize the view just the way you want it to appear, including sorting, manually reordering items, borders, background color, and so on. The view "type" you choose — thumbnail, item or list — directly affects how images are placed on the printed page.
3. When the Gallery is set up just the way you want it, choose File > Print.

### Printing Options

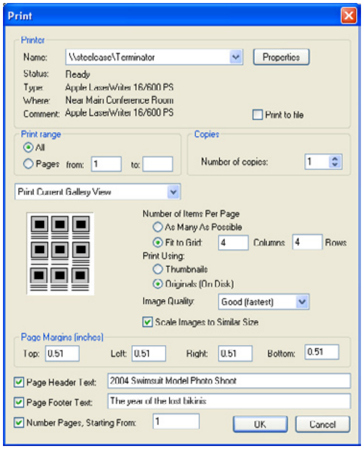
The Print dialog box contains the standard Printer selection, Page Range, and number of Copies controls as well as options that allow you to specify how items are displayed on the page.



To access the Portfolio printing options on a Mac, choose Portfolio from the options menu.

**Printer:** Choose a printer from the drop-down box and click Setup to set printer-specific options.

**Print Current Gallery View / Specific number of items per page:** This drop-down box allows you to specify how many images are placed on a page, and whether to use the current view settings.




Print Current Gallery View is the only setting that uses any saved view data from your gallery. All other settings print a specific number of items per page without any borders or text.

**Number of items per page:** When you choose to print the current gallery view, you can specify how many items are on a page.

- ***As Many as Possible – this option prints as many items as possible at the actual thumbnail size, including any item borders and text.***
- ***Fit to Grid - this option resizes the thumbnails and places them on a grid. Note that borders are not printed with this setting.***

**Print Using:** You can opt to have Portfolio print just the low-resolution thumbnails that you have stored in your catalog (by choosing Thumbnails) or full-resolution images (by choosing Originals).

**Image Quality:** This setting determines how much high-resolution data Portfolio uses when printing original images. The Best setting is a printer-intensive task. Some printers are not equipped with enough memory to support the amount of data being downloaded to the printer. If you experience problems, try switching to the "Better" or "Good" setting.

**Scale Images to be Similar Size:** This option is available when you choose the Fit to Grid option or choose a specific number of items per page. This option helps make the layout of horizontal and vertical images look more consistent.

For example, if choose a layout of four images per page on letter-sized paper, vertical images will all be the same size on the page, but a horizontal image would be smaller because it needs to fit within the smaller width. When you choose this option the vertical images are resized to be a more similar size to the horizontal images.

**Page Margins:** Set page margins in inches. The default is 0.5 inches on the top, bottom and sides of the page.

**Header/Footer:** The header or footer includes any text that you'd like to appear at the top or bottom of the printed page.

**Page Numbering:** You can turn page numbering on or off, or set a starting page number by typing a number in the Number Pages From text box.

## Printing Single Images

You can print a single full-size image by choosing File > Print from a Preview window. However, for best results it is recommended that you use the Edit Original command to open a cataloged image in its original application and print it from there.

## Printing Contact Sheets

A "contact sheet" is basically a page that visually displays a group of images. Contact sheets can be given to clients so that they can choose between many images, as well as just serve as a good printed reference of what is contained in a specific gallery.

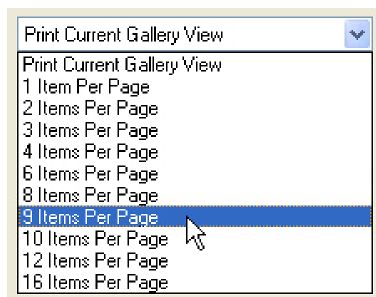
**To print contact sheets:**

1. Select the gallery to print as a contact sheet from the Galleries pane. There is no need to specifically customize the view - the images are printed "as is" without any borders or text.

2. Choose File > Print.

3. In the Print dialog box, select your printer from the drop-down menu.

4. From the Print Current Gallery View drop-down box, choose a specific number of images to include on each contact sheet page.



4. Enter a minimum amount of space between items into the text box. This minimum distance keeps images from running into each other.

5. To make all of the images roughly the same size, check the Scale Images to be Similar Size check box.

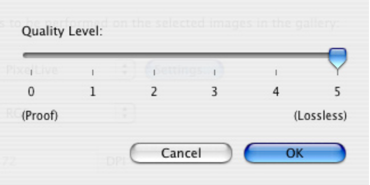
6. Enter any specific header, footer, page numbering and margin settings and click OK.

## PixelLive and PixelSafe files

### Powerful file compression

Portfolio has a powerful built-in compression file format, PixelLive (VFZ). This file format is a compressed format that provides visually lossless compression for images.

You have a choice of six compression levels to fit your varying file size and quality needs. Even at the highest quality level, PixelLive files are reduced to about 60% of comparable TIFF file size. The highest compression level produces proof quality images that are easily emailed.




### Password protection

A layer of password protection is added with the PixelSafe (PFZ) file format.

Password authentication in PixelSafe files is stored locally and embeds a user name and password in the image file.

## Working with PixelLive, PixelSafe and MrSID files

With Portfolio 7 you can catalog files that are saved in PixelLive (VFZ), PixelSafe (PFZ) or MrSID (SID) file formats.

PixelSafe are inherently password protected, and MrSID can be password protected. Portfolio has the ability to remember password information necessary to open these file types.

**To catalog PixelSafe or password protected MrSID files:**

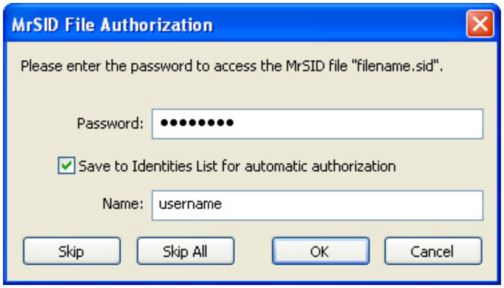
When you attempt to catalog a PFZ or SID file, Portfolio prompts you for a user name and password.

1. Add the files to an open catalog with the Add button or by dragging the file into Portfolio.

2. When prompted, for PFZ files, enter an appropriate User Name and Password.


For MrSID files, enter your password as well as a name. The name allows you to save the file to the list of identities.

3. If you want Portfolio to automatically remember this password information check the Save to Identities List for Automatic Authorization check box.




If checked, the user name/name is added to a list on the Authorization tab of the Preferences dialog box.

4. Click OK to catalog the file.

***Passwords are saved with the Portfolio application and not within the catalog. For shared catalogs, each user must enter an appropriate PixelSafe or MrSID password.***

When a PixelSafe or password protected MrSID file with is cataloged by AutoSync or Background Cataloging, you are not prompted for a password until your first attempt to view the file.

***Network-protected PixelSafe files (PADS) are not supported in Portfolio 7.***

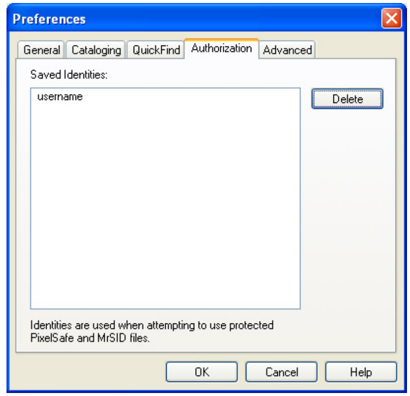
**To remove a PixelSafe or saved MrSID password:**

1. On Windows choose Edit > Preferences

   – or –

   On a Mac choose Portfolio > Preferences

2. In the Preferences dialog box, choose the Authorization tab.




3. Click to highlight the Username/Password Label and click Delete.

4. Click OK when finished.

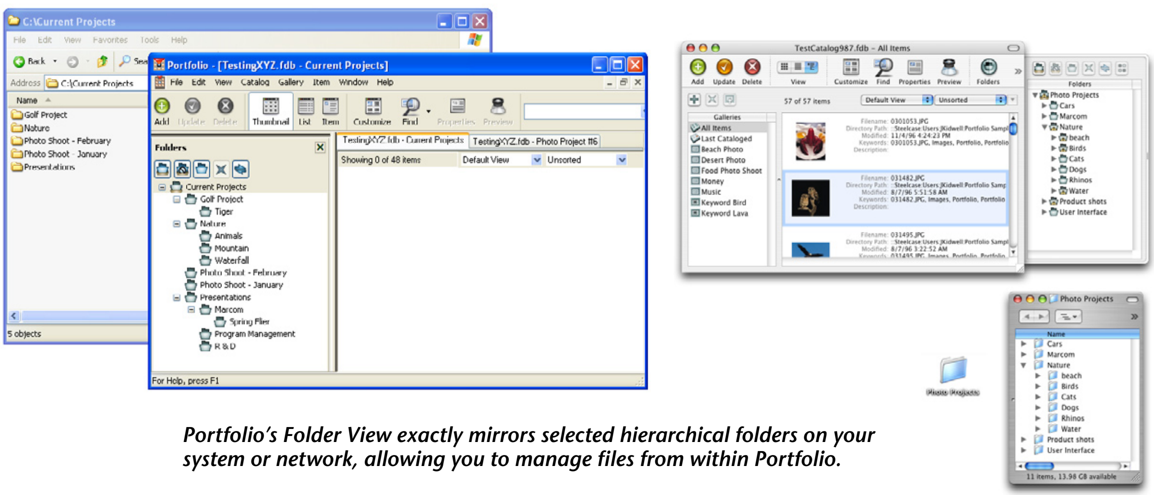
# Using FolderSync

FolderSync is one of the most important and powerful features in Portfolio — a dramatic tool that lets you synchronize the contents of any folder on your computer or network with your Portfolio catalogs — or vice versa.

## What is FolderSync?

FolderSync creates a link between specific folders on your computer system and items in a Portfolio catalog. Once you add a folder to FolderSync's Folder View, you can move items into that folder by simply dragging thumbnails into the folder from within Portfolio. Conversely, files that are moved into that folder on your computer system (using either the Mac's Finder or Windows Explorer) can automatically be cataloged in Portfolio, so that the contents of your Portfolio catalog exactly match the contents of your folders on disk.

FolderSync does more than just display the folders and files you have on disk; you can use it to create, move and delete folders, too, so that you can actually manage your disk files from within Portfolio — putting your cataloged files exactly where you want them.



*Portfolio's Folder View exactly mirrors selected hierarchical folders on your system or network, allowing you to manage files from within Portfolio.*

**Here are some of the typical ways you might use FolderSync:**

- ***Use Portfolio to organize your files on disk by dragging thumbnails into folders from within a Portfolio catalog.***
- ***Add an existing set of nested folders from your hard drive (or network) to Portfolio's Folder View and then catalog the contents of all the folders with one click of the Sync button.***
- ***Have Portfolio watch any number of folders on your network and provide a visual alert every time a file has been added, modified or deleted from those folders.***
- ***Move cataloged files from one folder to another on your network, without having to leave Portfolio or manually update your Portfolio catalogs.***
- ***Have other users in your workgroup add items to a catalog by simply dropping files into folders that are being watched by FolderSync; one click of the Sync button will bring them into your catalog.***

## Displaying the Folder View pane/drawer

In order to use FolderSync, you must have the Folder View pane (Windows) or drawer (Mac) displayed. If it isn't already visible, choose View > Folders to make the pane visible.

Initially, the Folder View is blank. Any folders on your hard drive or computer network that you want to keep synchronized with Portfolio will appear in this pane/drawer after you add them.

## Adding a new watch folder

To begin using FolderSync, you must tell Portfolio which folder (or folders) on your system you want it to "watch." If you want Portfolio to monitor a hierarchy of nested folders, point Portfolio to the topmost of the folders.

**To add a new folder to Folder View:**

1. Click the Add Watch Folder button  at the top of the Folder View pane/drawer.

2. Select the folder on your system that you would like to keep synchronized with Portfolio.

   A standard dialog box opens, asking you to choose a folder. If you want Portfolio to monitor an entire hierarchy of nested folders, select the topmost folder of the hierarchy. Portfolio automatically "sees" the subfolders and includes them in Folder View. Click the Choose button (Macintosh) or OK button (Windows) to select the folder.

   ***You can also use the New Folder button in the dialog to create a new folder on your system and add it to Portfolio's Folder View.***

3. The folder (or folders) you selected will now appear in a hierarchical listing in the Folder View.

   A watch folder appears in Folder View with a  small "filing box" icon.

   Any subfolders appear with a "subfolder" icon. 

4. Click the Sync  button to synchronize the contents of the newly-added folders with the current Portfolio catalog.

Whenever you add a new folder to the Folder View pane/drawer, its name initially appears in bold, indicating that it contains files that have not yet been synchronized with Portfolio.

Clicking the Sync button forces Portfolio to examine the contents of the selected folders and catalog any uncataloged items that are in the folder.

***If you add empty folders to the Folder View, they don't appear in bold, because there are no files within them that need to be synchronized with Portfolio.***

5. The FolderSync dialog box appears, listing all the files Portfolio will catalog in order to synchronize with the folder. Click the Sync button to continue the cataloging process.

## Removing a watch folder

When you remove a watch folder from the Folder View, Portfolio stops monitoring the folder on disk, and no longer keeps the folder synchronized with the contents of your catalog.

***Removing a watch folder doesn't delete the folder from your hard disk or network, nor does it delete any of the files in it; it simply "disconnects" the folder from Portfolio.***

**To remove a watch folder from Folder View:**

1. Select the watch folder you want to remove in the Folder View pane/drawer.

   Make sure you've selected the watch folder and not a subfolder.

2. Click the Remove Watch Folder button at the top of the Folder View pane/drawer.

***Be sure to use the Remove Watch Folder button in the Folder View pane/drawer, and not the Delete Folder button.***

3. Portfolio presents a warning that it will no longer watch the folder that you are removing from the Folder View list. Click OK.

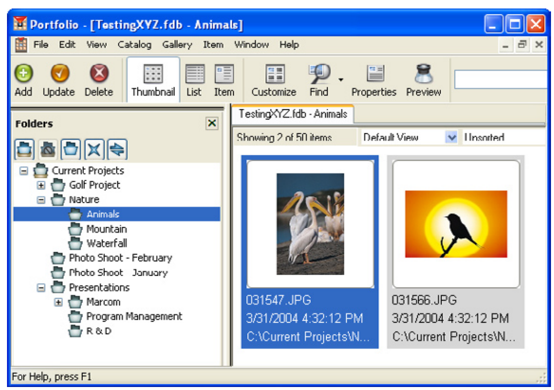
4. The watch folder no longer appears in the Folder View list, meaning Portfolio will no longer track its contents for you. The items that were stored in the removed folder are not deleted from the catalog.

## Viewing the contents of a folder using Folder View

Once you've added a watch folder (from your hard drive or network) to Folder View, you can use Portfolio to quickly view the contents of any available folder inside that folder, or in the watch folder itself.

**To view the contents of a folder, and all sub-folders:**

1. Click on a folder in the Folder View pane/drawer.



2. Files in the selected folder and all of its sub-folders appear in the current Portfolio gallery.

*To view only what is in a selected folder, and exclude any items in sub-folders, Ctrl-Click (Win) or Option-Click (Mac) the folder.*

*If the name of a folder in the Folder View window appears in bold, it means that files in the corresponding folder on your system were added, removed or modified since the last time you clicked the Sync button. If you want your Portfolio catalog to be updated to reflect those changes, click the Sync button either before or after double-clicking the folder.*

**To view the contents of only one folder:**

1. Hold down the Option key (Macintosh) or Control key (Windows) and click folder in the Folder View pane/drawer.

2. Files in only the selected folder appear in the current Portfolio gallery.

## Copying files using Folder View

To copy files from one Folder View folder to another, hold down the Option key while dragging the files on a Mac, or the Control key while dragging files on Windows. This works just as it does when copying files in the Finder or Windows Explorer.

*When you copy a file from one Folder View folder to another, you are making a duplicate of that file — which will result in two identical copies of the original file and two records your Portfolio catalog. If you don't want duplicate files or records, be sure to move the file, not copy it, as explained on the previous page.*

## Moving files using Folder View

You can use Portfolio to easily move and copy cataloged files in or out of any of the folders that appear in Folder View. In other words, there's no need to switch to the Macintosh Finder or Windows Explorer to move files from folder to folder as you organize them — Portfolio does it for you.

**To move an item into a folder using Folder View:**

1. Drag the thumbnail of any cataloged item into a folder displayed in the Folder View pane/drawer.

2. Portfolio automatically moves the file into the corresponding folder on your computer system and updates the Portfolio catalog to reflect the file's new location.

**Moving files from one folder to another:**

1. Double-click a folder in Folder View so that the files in the selected folder are visible in the current Portfolio gallery.

2. Drag the thumbnail of any cataloged item into another folder displayed in the Folder View pane/drawer.

3. Portfolio automatically moves the file into the corresponding folder on your computer system and updates the Portfolio catalog to reflect the file's new location.

*Moving files across volumes works just like the Macintosh Finder or Windows Explorer, copying the files to the new locations without deleting or moving the originals.*

## Creating new folders using FolderSync

With FolderSync, you can create new folders — or new subfolders of existing folders — right in Portfolio and use these folders to group and categorize your images on disk. There's no need to switch to the Macintosh Finder or Windows Explorer to set up these folders. You can add, delete and move folders on your hard drive or network right in Portfolio's Folder View pane/drawer.

**To create a new watch folder:**

1. Make sure you don't have any existing folders selected in the Folder View pane/drawer.
2. Click the Add Watch Folder button at the top of the Folder View pane/drawer.
3. In the folder selection dialog box, pick a location for the new folder and click the New button (Mac) or New Folder button (Windows). Click Choose or OK to confirm the selection
4. The folder you created will now appear as a new watch folder in the Folder View.

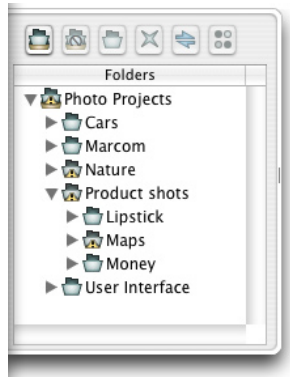
**To create a new subfolder:**

1. Select one of the folders already visible in Folder View.
2. Click the New Subfolder button at the top of the Folder View pane/drawer.
3. A new folder is created as a subfolder of the one you had selected.

## Synchronizing your folders

When the name of a folder in the Folder View pane/drawer turns bold, it means that the files in that folder have somehow changed since the last time you synchronized the folder with Portfolio. Among the possible "changes" that may have occurred:

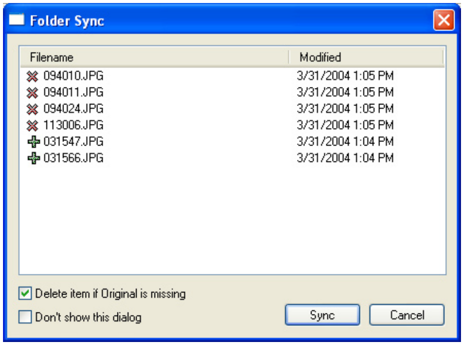
- ***A cataloged file was modified.***
- ***A file was removed from the folder using the Finder (Mac) or Explorer (Windows).***
- ***A new file was added to the folder.***
- ***An existing file was renamed.***




**To update your Portfolio catalog to reflect any of these changes:**

1. Select the folder that needs to be synchronized. Only folders with bold names require synchronization. To select multiple folders that need to be synchronized, just select the parent folder; the subfolders will be included in the sync automatically.
2. Click the Sync button .
3. Confirm the changes that have been made in the FolderSync dialog box.

The dialog box lists every change that has been made in the folder since it was last synchronized with Portfolio. Files that have been removed appear with a red "X" while files that have been added to the folder appear with a green "+" sign. Files that have been modified or renamed appear with a yellow check mark next to their names.




If, for any reason, you don't want Portfolio to be updated to reflect these changes (the wrong files were put in the folder by accident, for example), click Cancel, and your Portfolio catalog remains unchanged.

4. Click the Sync button in the FolderSync dialog box.

   When you click the button, Portfolio catalogs any new files in the folder, and updates the items of any previously-cataloged files that have been modified. Files that have been moved or are otherwise missing are deleted only if you turn on the Delete Items for Missing Source Files check box at the bottom of the dialog box.

5. The selected folder in the Folder View pane/drawer should no longer be bold, as the contents are now synchronized with the Portfolio catalog.

## Important notes on using FolderSync

- *Synchronized folders may stay "bold" for a few moments as Portfolio rescans the folders to confirm the changes resulting from a sync.*

*This delay may be longer if many folders and files are in the directories that are being synced.*

- *If files have been removed from a folder and you don't turn on the Delete Items for Missing Source Files check box in the FolderSync dialog box when using the Sync command, your folder will remain "unsynced" and in bold. This is because Portfolio still contains a item for a file that is no longer in that folder. To fully sync up the folder, activate the Delete Items for Missing Source Files check box and re-sync the folder.*

- *When you rename a file outside of Portfolio (using the Macintosh Finder or Windows Explorer), the renamed file will be considered a "new" file by Portfolio when synchronizing. When you sync the folder containing the renamed file, the catalog item for that file — including its keywords, description and any other stored data — will be deleted and a new item will be created for the newly-named file. For this reason, we recommend using the renaming features within Portfolio to make such changes.*

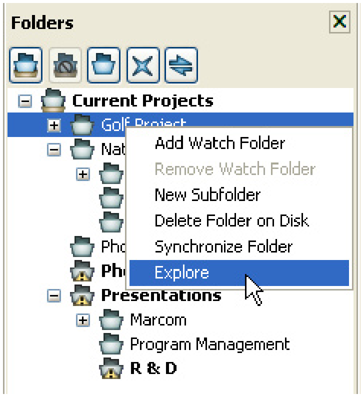
- *When you move a file from one FolderSync folder to another outside of Portfolio (using the Finder or Windows Explorer), Portfolio recognizes the file has moved and turns two folders bold — the one from which the file was removed and the one to which it was added. You must synchronize the parent folder of both of these folders at the same time in order for Portfolio to properly update the catalog. Otherwise, Portfolio will delete the item for the file's original location and create a new item for the file in its new location. While this will keep your catalog up to date, it could result in you losing information that was stored in the original item. Portfolio will always update items properly when you move files from one FolderSync folder to another within Portfolio.*

- *If you do not have network access to a FolderSync folder, the folder appears dimmed in the folder view list. You can see thumbnails for items in that folder that are part of the catalog, but are not be able to open or modify the items.*

## Switching to Windows Explorer or the Macintosh Finder

You can easily switch from Portfolio's Folder View to the Windows Explorer or Mac Finder to see how your files appear in their actual folders on disk.

**Windows:** Right-click on the name of any folder listed in the Folder View pane/drawer. Choose Explore from the menu.




**Mac:** Control-click on the name of any folder listed in the Folder View drawer. Choose Reveal in Finder from the menu.

## AutoSync folders

New to Portfolio 7 is the ability to create AutoSync folders in network catalogs on Portfolio Server. AutoSync folders are basically FolderSync folders that can be automatically synchronized by the server. The benefit of an AutoSync folder is that all of the work is done by Portfolio Server. This way, you can do other work in your catalog while Portfolio Server automatically updates the AutoSync folders.

For detailed instructions about creating and using AutoSync folders, see the Portfolio Server User Guide.

# Organizing files with Portfolio

One of the main purposes of Portfolio is to help you sort, arrange, categorize and organize your files. This helps you work more efficiently, eliminates the problem of lost or misplaced files, and streamlines the process of finding and distributing your digital files on demand.

This chapter covers how to use the numerous tools within Portfolio that help you organize files with the minimum effort. These tools include:

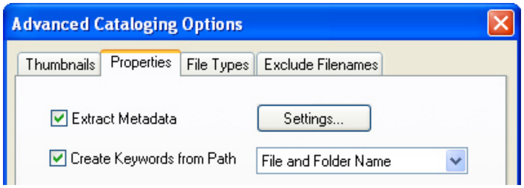
- *Keywords*
- *Custom Fields*
- *Galleries*
- *Categories*
- *The Properties dialog box*
- *The Edit Field Values window*

## Keywords

Keywords are descriptive words and phrases that you can assign to your cataloged files in order to categorize and classify them. If you had an image of a tropical beach at sunset, for example, you might assign it keywords such as Sand, Beach, Ocean, Sunset, Tropical, Vacation, Recreation, Outdoor, and so on. Any of these terms would make it easier to group the image along with other related images, and also make it easier to search for the file. In Portfolio, there's no limit to the number of different keywords that you can assign to an item.

### Adding keywords automatically

Even if you haven't typed a single keyword in Portfolio, the images in your catalogs may already have at least some keywords. This is because Portfolio includes two features that keyword items automatically as they are cataloged:




#### Extract metadata

If you have this option turned on, Portfolio extracts keywords and other metadata that are embedded in certain kinds of documents. Graphics programs (such as Adobe Photoshop and Adobe Illustrator) as well as digital cameras automatically embed metadata into files. EXIF, IPTC and XMP metadata can all be read and extracted by Portfolio.

#### Create keywords from path

With this Advanced Cataloging Option, Portfolio adds keywords to each file you catalog, based on the name and location of each file on disk.

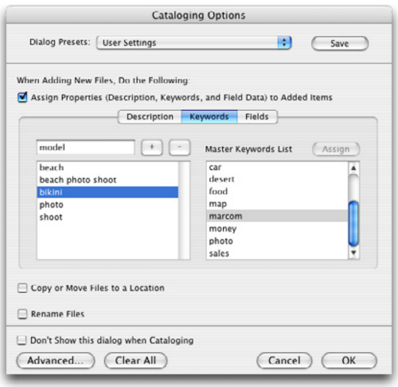
***See the Setting Up Porfolio chapter of this guide for more information on extracting and creating keywords.***

## Seven ways to add keywords

Portfolio provides several convenient ways to add keywords to the items in your catalog:

### METHOD 1: Add them during cataloging

Using the Portfolio Cataloging Options, you can assign keywords to multiple items as they are being cataloged. For details, see the Assigning keywords during cataloging of the Setting Up Portfolio chapter.



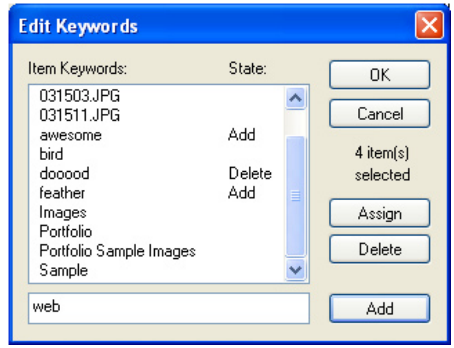

### METHOD 2: Use the Edit Keywords command

This method is useful if you have to add the same keywords to a number of different files:

1. Select the item(s) to which you want to assign keywords in a gallery window.

2. Choose Item > Edit Keywords, or press ⌘-Option-K (Mac) or Ctrl-Shift-K (Windows).

The Edit Keywords dialog opens. The keywords that have already been assigned to at least one of the selected items are displayed in the keywords list.




3. Type a keyword in the text box, then click Add.

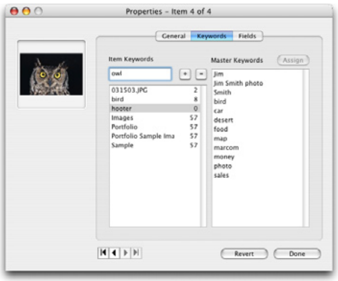
   The “State” of the keyword is changed to “Add,” indicating that it will be added to the catalog and assigned to the selected items.

***You don’t have to click Assign after you add a keyword—Add implies Assign (that is, all keywords with either Add or Assign in the State field will be assigned to all selected items in the active Gallery when the dialog is closed. Add just tells you it’s a new keyword).***

4. Click OK to when you’re done adding keywords.

### METHOD 3: The Properties dialog box

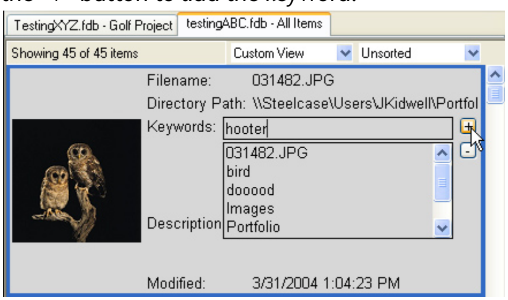
You can add keywords to each individual item through the Properties dialog box (Item > Properties). This method works particularly well if you have different keywords that you'd like to assign to each item. See the Using the Properties dialog box section later in this chapter for details.




### METHOD 4: Use Item View

You can also edit the keywords for any item directly when you're in Item View.

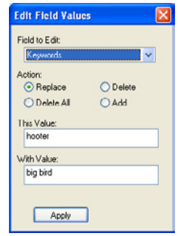
1. Click anywhere in the Keywords field of the item to activate keyword editing.
2. To add a keyword, type it in the text entry field, click the "+" button to add the keyword.




You can edit any editable data field in item view using this same approach.

### METHOD 5: Keywording with Edit Field Values

The Edit Field Values command makes it easy to add, remove or replace keywords across an entire selection of items. For instructions on how to use it, see the Using the Edit Field Values command section later in this chapter.




### METHOD 6: Use the Master Keywords palette

If the administrator of your catalog has created a set of master keywords, these are available on the Master Keywords palette. Choose Window > Show Master Keywords to display the palette.

Setting up Master Keywords requires Administrative access to the catalog. See the Catalog Administration chapter for details on creating master keywords.

**To assign a keyword from the Master Keywords palette:**

1. Select the item(s) to which you want to add a keyword.
2. Select the word on the Master Keywords palette that you'd like to assign to the item(s).
3. Click the Assign button on the palette.

You can also drag and drop keywords from the Master Keywords palette to assign them.

1. Drag a keyword from the Master Keywords palette and drop it on any thumbnail to assign the keyword to that item.
2. To assign keywords to multiple items, first select the items in the gallery, then drop a keyword on any one of the selected items. The keyword is automatically assigned to all the selected items.

### METHOD 7: Drag and drop text

You can select text from any drag-and-drop savvy program (such as Microsoft Word) and drag the selection onto a Portfolio thumbnail to assign the words in the selected text as keywords.

## Five ways to avoid typing keywords

If you find typing and entering keywords tedious — and most users do! — take note that several of the techniques referenced in this section are specifically designed to keep manual keywording to a minimum:

- ***Convert file and folder names into keywords when cataloging.***
- ***Assign keywords during cataloging using Cataloging Options.***
- ***Import an existing Master keywords list into the Master Keywords palette.***
- ***Drag and drop keywords onto thumbnails to assign them.***
- ***Use the Edit Field Values command to assign a keyword to multiple items.***

## Removing keywords

There are four quick ways to remove unwanted keywords:

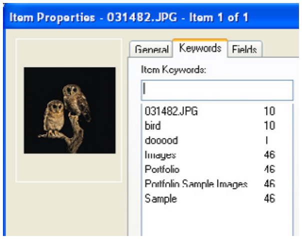
- ***Use the Edit Field Values command to remove a keyword from a selected group of items. See the Using the Edit Field Values command section later in this chapter.***
- ***In the Keywords tab of the Properties dialog box, select a keyword, then click Remove. You can Shift-click to select multiple keywords or ⌘-click (Mac) or Ctrl-click (Windows) to select multiple non-contiguous keywords in the list and delete them all at once.***
- ***In the Edit Keywords dialog box, select a keyword, then click Remove.***
- ***In Item view you can select keywords and click the "-" button to delete them.***

## Viewing Keywords

You can view the keywords associated with a selected item in the following locations:

- ***In any thumbnail, item or list view (View > Item), if keywords have been included in the view.***
- ***In the Keywords tab of the Properties dialog (Item > Properties: Keywords)***
- ***In the Edit Keywords dialog box (Item > Edit Keywords).***

When keywords are shown, the number beside each keyword indicates how many items in the catalog have that keyword assigned.




The numbers that appear in keyword lists tell you how many times each word is used in the catalog.

## Custom Fields

Custom fields allow you to store just about any type of information you want — a date, a number, a block of text, or a URL — about the items you catalog, giving you much more flexibility when it comes to organizing, categorizing and searching for your files.

Custom fields are perfect for organizing your files based on information that isn't strictly a "keyword" or a "description." For instance, you might want to add a field for a URL that points to a website related to the cataloged file, or a "Photographer" field to a catalog of digital photos, or a field to hold price information or stock numbers.

**Portfolio lets you create and use six types of custom fields:**

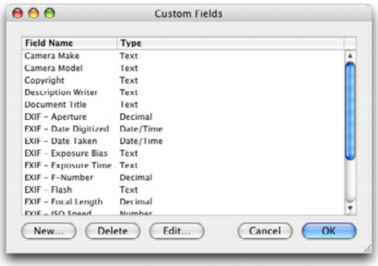
- **Date/Time:** Enter date and/or time values. You could use this field type to create a Custom Field for image publication dates, for example.
- **Decimal:** Enter decimal point numeric values. This field type would be useful for custom fields containing stock image prices.
- **Number:** Enter regular numeric values. This field type is ideal for custom fields containing catalog part or stock numbers, as long as they contain only numeric values.
- **Text:** Enter single line text values. Can be used for any number of custom fields, including photographer or artist names.
- **Text Block:** Enter multiple lines of text with line breaks.
- **URL:** This field type is used for Web and other URL addresses. It creates an active hyperlink that can be displayed in gallery views.

***Creating custom fields is an administrative function in Portfolio. To create custom fields, you must have Administrator-level access to the catalog. See the Catalog Administration chapter for details.***

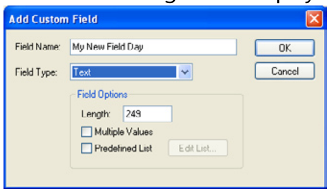
### Adding Custom Fields to a catalog

**To add a custom field:**

1. Change your access level to Administrator mode. Choose Catalog > Access Level, change the Catalog Access level to Administrator and enter the password if necessary, then Click OK.
2. Choose Catalog > Custom Fields.




3. In the Custom Fields dialog box, click New. The New Field dialog box is displayed.




4. Enter a name for the field in the Name text box.

5. Choose the field type. The field type determines the values that can be entered into this field. (See the Guide to Custom Field Types below).

*Field types cannot be changed once they are defined.*

6. Select the appropriate remaining options for the field type you selected, then click OK to return to the Custom Fields dialog box.

7. When you have finished adding Custom Fields, click OK.

## Guide to Custom Field Types

The following is a complete guide to the attributes associated with each of the custom field types you can create in Portfolio.

### Date/Time

This field type allows you to enter date and/or time values into your items. You can elect to have Time values not displayed by deselecting the Display Time option in the Date/Time Custom Field Definition dialog. Date/Time fields include multiple values, and/or can be configured as a predefined list.

*Times are always assumed when searching on Date/Time fields. That is, if a time value has been entered into the field (either by extraction from the source file when the item was cataloged, or by entering a time in the field) and then hidden by turning off "Display Time," the time will still be noted by Portfolio when a search is generated. For example: Searching for "5/20/02" will not find an item which contains "5/20/02 3:00 pm" because the request is interpreted as "5/20/02 12:00:00." This is true even if the time is not being displayed.*

### Decimal

In this field type, you can enter decimal point numeric values with a precision up to 8 decimal points. Decimal fields can include multiple values, and/or be configured as a predefined list. To set the Precision, select it from the drop-down menu.

### Number

For regular numeric values. Number fields include multiple values, and/or can be configured as a predefined list.

### Text

This field type is designed for single line text values. You can specify a maximum length for the field by entering the number of allowable characters in the Length text box. The data in a Text Field can be from 1 to 249 characters long, and include multiple values, and/or be configured as a predefined list. Fields cannot contain multi-lined text (for multi-line text, use Text Blocks).

### Text Block

Text Blocks are multi-lined fields that can be any length up to 32K. This field type allows you to add multiple lines of text to items; you can include line breaks or carriage returns.

Text blocks are word-indexed, allowing even these longer fields to be searched extremely quickly. The Text Block field cannot be sorted or phrase-searched.

### URL

This field type allows you to enter Web and other URL addresses. If the syntax is correct for a URL, the data will become an active hyperlink.. To create an active link, enter any reference in URL format including: http, ftp, telnet, gopher, even local files or applications. Typically URL data might look like:

- *http://www.extensis.com*
- *ftp://ftp.extensis.com/pub/file1.zip*
- *http://www.extensis.com/buynow/cgi?sku=012345*
- *mailto:username@extensis.com*

When you edit a URL to add data to it (Item > Properties > Fields tab > Edit button) the Title that you enter is displayed in the item and becomes the active link (Portfolio links the Title to the actual URL in the URL field). You can give the URL any Title you like—the Title does not need to refer to the actual URL.

***When importing data into a URL field (File > Import Field Values), Portfolio treats the URL field as a multi-valued field with two values. The first value is the Title and the second value is the URL address. If you wish to import URLs into Portfolio they must conform to this format. Portfolio follows the same formatting when exporting URL data. .***

***URL fields cannot be set up with a predefined list, cannot have multiple values, and must have both title and URL fields filled.***

## Multiple Value Lists

Multi-value lists allow you to specify custom fields (except URLs and Text Blocks) that can contain more than one value, such as multiple vendor names or multiple item pricing.

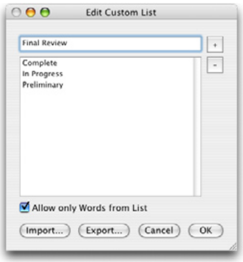
To set up a Custom Field with Multiple Values turn on the Multiple Values check box when setting up a custom field in the Custom Fields Definition dialog box, as outlined on the previous page.

## Predefined Lists

With all custom fields (except URLs and Text Blocks) you can set up predefined lists of values so that users can select from your ready-to-use choices when filling in a custom field.

For example, suppose you create a custom field called Status that you use to track the completion status of each item in your catalog. You might define four values — Preliminary, In Progress, Final Review, Complete — and use those values to label your images. Here's how you would set up the pre-defined values:

1. When defining a custom field, turn on the Predefined List checkbox.
2. Click the Edit button
3. In the Edit Custom List dialog box, enter each of the values you want to use in this field; click the Add button to insert each item into the list.

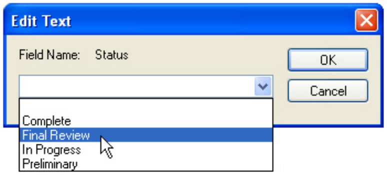


4. If you want only these terms to be used in this field, check the Allow only words from List checkbox.

5. Click OK to finish defining the field.

Alternatively, you can import the values for a predefined list from a text file. In the text file, each value should be separated by a hard return. Click the Import button in the Edit Custom List dialog box to select the text file and import the values into your predefined list.

Now, when users go to edit this field using any of Portfolio's standard field-editing tools (such as the Fields tab of the Properties dialog box or the Edit Field Values dialog box, or an item view in which the Status field is displayed) the four predefined choices will be available via a drop-down menu.




## Editing and Using Custom Fields

Once custom fields have been defined, you can edit them in your catalog using most of the same methods discussed earlier in this chapter for editing keywords:

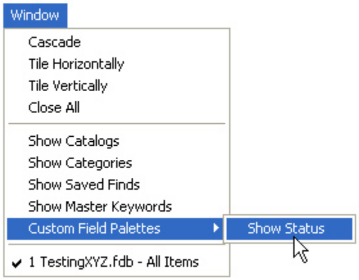
- ***Add them during cataloging by assigning field values in the Cataloging Options dialog box.***
- ***Open the Fields tab of the Properties dialog box and double-click on a field to edit its contents.***
- ***Customize the item view (View > Customize > Item tab) so that your custom fields are visible and edit the fields directly from your gallery.***
- ***Use the Edit Field Values command (Item > Edit Field Values) to add, remove or replace the content of any field across a selection of items.***

## Displaying custom fields as palettes

To make using custom fields even easier, Portfolio has the ability to display the values you set up in a predefined list as a palette — similar to the Master Keywords palette described earlier in this chapter. This allows you to easily assign field values with just a few clicks — and without having to open individual items.

When you create a custom field with a predefined list of values, a new palette bearing the name of that custom field automatically appears in the Windows menu, under the Custom Field Palettes submenu.

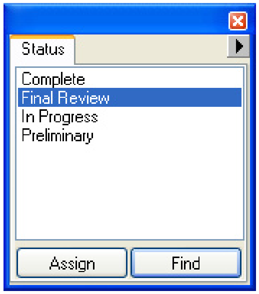
To use the example given earlier, creating a custom field called Status with a list of four predefined values would add a Show Status command to the Window > Custom Field Palettes submenu.




Choosing the Show Status command opens a new palette called Status, containing the predefined list of values that you can use in the custom field.

### Assigning custom field values using a palette

Custom field palettes work exactly like the Master Keywords palette described earlier:




1. Select the item(s) for which you want to fill in a field value.
2. Select the entry on the custom field palette that you'd like to assign to the item(s).
3. Click the Assign button on the palette.

You can also drag and drop the entries from custom palettes on to thumbnails to assign them.

1. Drag a value from a custom field palette and drop it on any thumbnail to assign the entry to the corresponding custom field for that item.
2. To assign values to multiple items, first select the items in the gallery, then drop a custom field palette entry on any one of the selected items. The value is automatically assigned to all the selected items.

Returning to the example of the custom field containing job status: To assign 10 items in your catalog the status of In Progress, you would select those items in the gallery window, click on the words "In Progress" on the Status custom field palette (as shown above) and then click the Assign button.

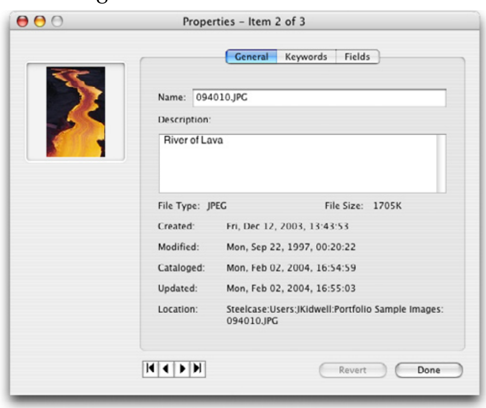
## Editing and replacing item information

Portfolio stores a great deal of information about your files — keywords, descriptions, and so on. This section covers the best ways to edit that information — both on an item-by-item basis and in batches.

### Using the Properties dialog box

An easy way to quickly add and edit information about your files is the Properties dialog box, described in the "Getting information about your files" section of the Managing files chapter.

Using the Properties dialog box navigation buttons and keyboard shortcuts, you can easily move from item to item in your catalog, typing descriptions and adding custom field data for each item.




For example, suppose you need to add a text description to the Description field of 25 different items in your catalog. Here's how you could use Properties to quickly add the information:

1. Select the thumbnails of the 25 items you want to edit.

   You can Shift-Click in a gallery to select a range of thumbnails. To select multiple non-contiguous items in a gallery window, ⌘-Click (Macintosh) or Control-click (Windows) the thumbnails.

2. Open the Properties dialog box.

   You can do this by clicking the Properties button on the toolbar, or by pressing ⌘-I (Mac) or Alt-Enter (Windows). The information for the first of your selected images is displayed in the Properties dialog box.

3. Click in the Description field and type your description.

4. When you're done typing the description, press ⌘-Right Arrow (Mac) or Ctrl-Right Arrow (Windows) to advance to the next item.

   The Properties dialog box moves directly to the next selected item, so you can type in the next description.

5. Repeat Steps 3 and 4 until you've filled in the Description field for all 25 selected items.

   You can use this same technique — navigating from item to item within the Properties dialog box — to edit keywords and custom field data for any cataloged file.

## Batch item editing

The Properties window (described above) is useful for editing field values for individual files — typing a unique description for each file, for example — but sometimes you need to edit add or remove the same information for a number of items. For example, you might want to:

- ***Assign the keyword "sunset" to 70 different images at once.***
- ***Add a photographer's name to a custom field for all 150 items in the current gallery.***
- ***Clear all the descriptions and keywords for all the items in your Portfolio catalog.***
- ***Find all the occurrences of one particular keyword and replace it with a different keyword.***

To handle these tasks, use the Edit Field Values command, described below.

## Using the Edit Field Values command

Edit Field Values is designed to speed up the process of adding, removing and editing values in virtually all editable Portfolio fields, including Keywords, Description, and any of your custom fields.

**To edit field values:**

1. Select the thumbnails of the items you want to edit.

   The Edit Field Values commands operate only on selected items. If you want to edit values in all the items in a gallery, choose Edit > Select All to select the entire gallery.

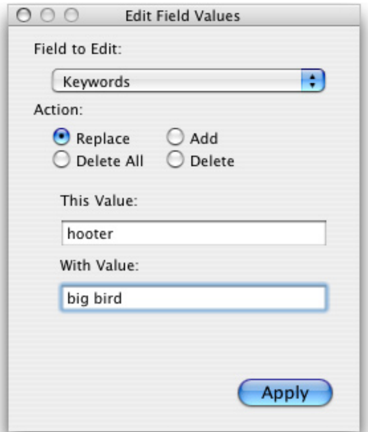
2. Choose Item > Edit Field Values to open the Edit Field Values dialog box.

3. Select the field you want to edit from the Field to Edit menu.

   All editable fields, including your custom fields, are displayed in the menu.

4. Select an action from the Action radio buttons.

   Depending on the field you choose to edit, you can Replace, Delete, Add or Append data.




5. Specify the value that you want to add, change, or delete in the Value field. In the case of a Replace action, you have to specify both the value you're replacing and the value you're replacing it with.

6. Click the Apply button.

## Sorting items

You can sort the contents of a Portfolio catalog by most fields — including any of the custom fields that you create. Sorting items by filename, size, color mode, file type, or other criteria can make it easier to browse through and organize a collection of files.

You can also sort items in your catalog into a custom order by simply dragging thumbnails into any position you want. Sorting via drag and drop isn't practical if you're trying to put a large number of files in a strict order, but it can be useful if you simply want to rearrange a smaller number of items into exactly the order you want.

### Sorting a gallery


To sort files, use the Sort menu available in the upper right corner of the status bar that runs along the top of each gallery window (right under the main Toolbar). By default, this menu simply says "Unsorted." Choose any of the criteria in the menu to apply a sort order to the current gallery. (By default, galleries are always sorted by the order in which items were cataloged.)

After you've sorted a gallery using the Sort menu, the current sort field remains displayed in the menu, so you can see the sort order for any gallery window at a glance.

### Keeping a gallery sorted

If you want to keep a gallery sorted, you can save the sort order in a view.

1. Choose Gallery > Settings.
2. Check the Sort the Gallery option.
3. From the Sort By Field drop-down box, choose a field to use for sorting.
4. From the Direction drop-down box, choose a sort order (ascending or descending).
5. Click OK to apply the sort settings.

***When the gallery is first opened, it is automatically sorted. If you change the sort order after opening the gallery, that gallery will keep the new sort order until you close the entire catalog.***

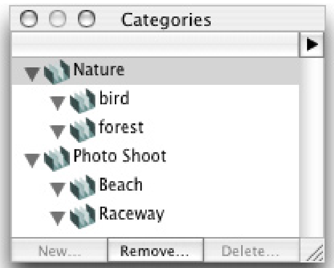
## Using Categories

Portfolio offers the ability to organize groups of items visually, using a folder-like hierarchy which is accessible through the Categories palette.

For example, you might want to use this feature to:

- ***Organize all the versions of a job file, such as low and high resolution images, RGB version, CMYK files, etc.***
- ***Arrange all the elements of a print job, such as the document files, images, and fonts.***
- ***Categorize your image content using a system of hierarchical keywords so that you have a general category, (such as Animals) within which is nested narrower topics (Birds) and sub-topics (Waterfowl).***

The Categories palette consists of a hierarchy of folders that are linked to items in the catalog. By double-clicking a folder icon on this palette you can display all the cataloged items in a folder and, optionally its subfolders.




Using options on the Categories palette you can create the folder hierarchy manually, then drag items from the catalog onto the Categories palette folders to link them.

You can also drag folders from the Categories palette to the Macintosh Finder or Windows Explorer to create a copy of an entire job (folders, subfolders, and the cataloged contents), or any number of individual folders and contents, to any local or network volume in one easy step.

### Categories vs. FolderSync

The Categories feature is similar to Portfolio's FolderSync feature. Both Categories and FolderSync help you organize your digital files into an hierarchical folder structure — but they take very different approaches to these tasks.

The Categories feature uses a nested folder structure to help you organize your files. But the folders you see on the Categories palette are virtual folders. While they can be based on a set of folders from your computer system, they aren't real folders that exist on your network or hard drive. They simply provide a way for you to mentally group and

organize files within the Portfolio environment. There's no "live" link between the folders on your computer and the "folders" in the Categories palette. When you drag items into folders on the Categories palette, nothing happens to the original files on disk; they stay where they are.

The Categories palette also can generate a brand new set of folders on disk that exactly mirror the hierarchy that you set up on the palette — but it can't move files into existing folders on your system.

FolderSync, on the other hand, allows you to organize your files in real folders on disk. Double-clicking a folder in Portfolio's Folder View shows you the actual contents of that folder on disk. With FolderSync, there is always a "live" connection between Portfolio and the folders on your hard drive or network. When you move and group files in Portfolio using FolderSync, you are moving the original files, in real time, on your hard drive or network. Foldersync isn't just a categorization tool, it's a file management tool.

***While the Categories feature is a powerful organizational tool, most users are best served by using FolderSync, which organizes files both logically and physically on disk.***

## Creating categories

To begin working with Categories, choose Window > Show Categories to open the Categories palette (as shown on the previous page). You must have Administrator access to a catalog in order to create categories.

**To create a new category using the Categories palette:**

1. On the Categories palette, click the New button or choose New from the palette fly-out menu. You will be prompted to enter a name for the folder.
2. Enter the folder name, then click OK.

   A folder is created at the selected level (below the currently selected folder) on the Categories palette.
3. Continue creating folders (steps 1 and 2) until all the folders have been created.
4. Drag the folders up and down as necessary until the folder hierarchy is as you like it. Use the insertion bar to gauge exactly where to drop each folder.

**To remove a Category:**

- On the Categories palette, select the Category that you want to delete, then click the Detele button at the bottom of the palette, or choose Delete Category from the fly-out menu.

## Assigning items to categories

Once you've established categories, you can use them to group cataloged files.

**To link cataloged items to an existing category:**

1. Make sure you've got the Categories palette open.
2. Select the item(s) that you want to categorize, then drag and drop them into the desired category on the Categories palette. The selected Gallery items will be linked to the folder.

— or —

1. Select the items in the gallery.
2. On the Categories palette, select the target category.

3. From the Categories palette fly-out menu, choose Apply Items to Category. The selected Gallery items will be linked to the category "folder."

**To display cataloged items in a specific category:**

1. Double-click the desired category folder on the Categories palette.

2. Items in the selected folder will be displayed in the Gallery. If you want to display items in a Category and all sub-categories, choose Show Items in Sub-categories from the palette fly-out menu. Items in the selected folder and all sub-folders will be displayed in the Gallery.

**To remove cataloged items from a category:**

1. Select the items that you want to remove from the category.

2. Click the Remove button on the Categories palette, or choose Remove Items from Category from the fly-out menu. The selected catalog items will be removed from the category folder, but not from the Gallery or Catalog.

### Creating folders on disk

After you've categorized you files, Portfolio can replicate your organized folder structure on disk. Note that this process doesn't move your original files; it makes copies of your files in a new location, based on the folder structure on the Categories palette.

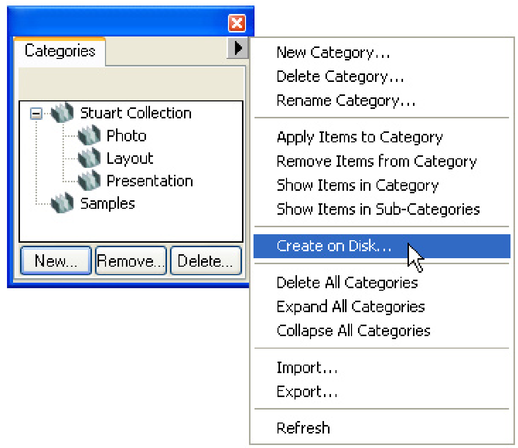
**To create a category-based file and folder structure on disk from your Categories:**

1. On the Categories palette, select the top-level folder that you want to create the Category from.

2. Drag the folder to the Finder (Mac) or Explorer (Windows). A dialog is displayed asking if you want to create one folder for all the items, or if you prefer to maintain the folder hierarchy.

— or —

1. Choose Create on Disk from the palette fly-out menu, then choose a folder where you want the items to be stored.




2. Click Create one folder to have all items placed in a single folder, or Create all folders to maintain folder hierarchy.

   Portfolio will create new "real" folders on disk that correspond with each of the folders on the Categories palette and a copy of each original file will be placed in the appropriate folder.

# Finding files with Portfolio

One of Portfolio's most important functions is to help you search for and retrieve your digital files when you need them. When you think about it, the whole point of cataloging, keywording and categorizing your images is so that ultimately you'll be able to find and use them as quickly as possible.

This chapter covers the various powerful tools available within Portfolio to perform lightning-fast searches that give you access to the files you need on demand, including:

- ***Using the Toolbar's QuickFind field.***
- ***Performing advanced, multi-criteria searches.***
- ***Searching across multiple Portfolio catalogs.***

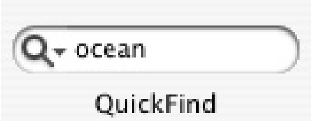
***To quickly find your cataloged files when you're not running Portfolio or when you're working in other programs, such as Adobe Photoshop or QuarkXPress, use the Portfolio Express palette, as described in the next chapter. The Portfolio Express palette is the quickest way to grab the files you need for use in other programs.***

## QuickFind

The easiest and most accessible search tool in Portfolio is the QuickFind box, located on the right side of the Toolbar. QuickFind allows you to search for files in the current gallery based on the content of any combination of fields. With QuickFind you need not click a button, pull down a menu or open a Find dialog box. It's the fastest, easiest way to perform a file search.

**To perform a QuickFind search:**

1. Click in the QuickFind box
2. Type a word or phrase in the box and press Return.




   By default, QuickFind searches the filename and description fields using a "contains" search, and uses a "starts with" search on multi-value fields such as keywords.

   To change the fields that are searched by QuickFind, see Customizing QuickFind Searches below.

3. Matching items appear in the Find Results gallery.

***The text you've typed in the QuickFind box remains selected after you've pressed Return and performed a search. To do another QuickFind search, all you have to do is type another search word or phrase and press Return again.***

### Multiple searches in the same gallery

Since QuickFind searches only the current gallery, you can quickly refine your search for specific items. For example, if you wanted to find all of the items that contained the keyword bird:

1. Click to select the All Items gallery in the Galleries pane.
2. Type "bird" into the QuickFind field and press Enter on your keyboard. A new gallery is displayed with the search results.

3. Next, refine your results to only include birds that have the keyword “red”. Type “red” into the QuickFind field and press Enter. Portfolio searches only the current gallery (that contains the “bird” QuickFind results) and displays the found items in that gallery.

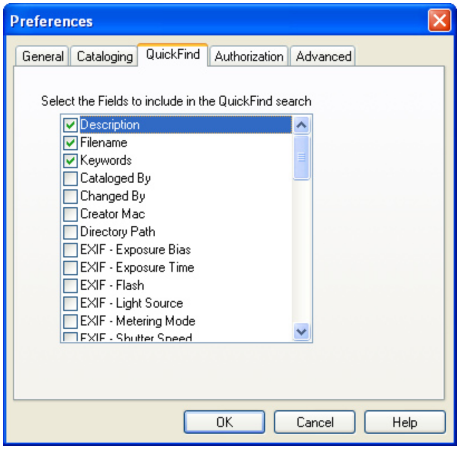
## Customizing QuickFind searches

You can choose exactly which fields QuickFind includes (and which it ignores) when doing searches by adjusting the QuickFind Preferences. This is what makes the QuickFind so powerful; you can “tune” it to perform any multi-field search you want.

The settings you choose in QuickFind preferences, also affect the QuickFind box in the Portfolio Express palette.

### Changing the QuickFind Preferences:

1. With a catalog open, choose Edit > Preferences (Win) or Portfolio > Preferences (Mac).
2. Choose the QuickFind tab.




3. In the list of fields, check the fields that you want to include in QuickFind searches.

   Fields included in a QuickFind search appear with a check mark next to them. QuickFind searches the filename, description and keyword fields by default.

4. Click OK to confirm your settings.

*QuickFind preferences are saved for each user on a catalog-by-catalog basis. In other words, each catalog has its own QuickFind preferences and must be configured separately. QuickFind preferences are also only stored on each user’s machine and are not shared between multiple users.*

## Searching from palettes

The Master Keywords palette and any other palettes you may have created from custom fields also provide an easy way to perform simple searches without having to open any dialog boxes.


To search from the Master Keywords Palette, double-click the desired keyword on the palette. All items with the selected keyword are displayed in the active gallery window.

*To quickly move through a long list of keywords, type a letter in the text entry field of the Master Keywords palette to move the cursor to keywords starting with that letter.*

## Using the Find Command

For many Portfolio users, the simple multi-field search possible using the QuickFind box is all that is needed. However, Portfolio's sophisticated search engine can also perform complex searches using multiple criteria. Complex searches can be saved so that queries can be performed again with a minimum of effort. Saved searches can also be applied to galleries to create "smart galleries" that automatically execute the saved find each time opened.

Portfolio's Find command allows you to search any fields in any combination, with specific search parameters.

There are three ways to access the Find dialog box:

- *Click the Find button on the toolbar* .
- *Choose Catalog > Find (Win) or Edit > Find > Find (Mac).*
- *Press ⌘-F (Mac) or Ctrl-F (Win).*

### Searching for specific items

1. Open the Find dialog box (using one of the three methods described above).
2. If you would like to use a Saved Find, click the Saved Find drop-down menu and choose it from the list. The search parameters are filled with the saved settings. Click Find to execute the Saved Find.

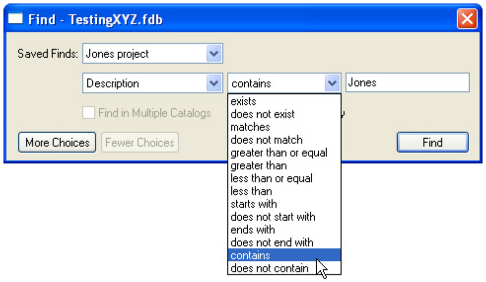
— or —

2. Select the criteria you want to use for the search by choosing a search field from the Field menu.

   See the table on the following pages for a description of the fields you can use in your search.

3. Select a match option from the middle menu.

   There are anywhere from 8 to 14 different options, depending on the field you're searching. You can look for the exact term with "equals" or "matches" or be less rigid and use "contains" or "does not end with").




***When searching for files with a specific date, choose "contains." Do not choose "matches" since this requires not only the date, but the exact time also.***

4. Select the other Find options.

   The check boxes in the dialog box determine where Portfolio searches for your items and how it displays the results. The options are:

   **Find in Current Gallery:** If you turn on this check box, Portfolio will search only the items that are in your current gallery, ignoring all other items in your catalog. This is useful for doing progressively narrower searches to zero in on a target file. If you want Portfolio to scan every item in your catalog for possible matches, make sure this option remains unchecked.

   **Find in Multiple Catalogs:** This option is dimmed out unless you have more than one catalog opened. If you do have two or more catalogs opened, you can turn this on to have Portfolio search all the opened catalogs for matching items. See "Searching Across Multiple Catalogs" later in this chapter for details.

5. Click Find to start the search.

## Search Criteria Options

You can search on any system or custom fields with the Find command.

| Field Name | Finds this... |
|---|---|
| *Camera Make* | *Custom text field that can contain the camera make that created the image* |
| *Camera Model* | *Custom text field that can contain the model of camera that created the image* |
| *Cataloged* | *The date and time that the item was first cataloged in Portfolio* |
| *Cataloged By* | *The UserID of the person who cataloged the item in Portfolio* |
| *Changed* | *The date and time that the item was recently changed* |
| *Changed By* | *The UserID of the person who most recently changed the item* |
| *Color Mode* | *Color modes: Unknown, Black & White, Grayscale, RGB, CMYK, YUV, Lab, and YCCK* |
| *Copyright* | *Custom text field that can contain copyright information* |
| *Copyright Status* | *Custom text field that can contain copyright status information* |
| *Created* | *The date the original file was created* |
| *Creator Mac* | *The four-character file creator code for the item (empty if cataloged on Windows)* |
| *Description* | *The item's file description* |
| *Description Writer* | *Custom text field that can contain the UserID of who wrote the description* |
| *Directory Path* | *The full directory path for an item, not including the filename* |
| *Document Title* | *Custom text field that can contain a document title* |
| *Extension* | *The item's three-character file extension* |
| *File Size* | *The item's file size* |
| *Filename* | *The item's name* |
| *File Type Mac* | *The four-character file type code for the item (empty if cataloged on Windows)* |
| *Height* | *The item's height, in pixels (empty if thumbnails were extracted)* |
| *Horizontal Resolution* | *The item's horizontal resolution, in dpi* |

## Search Criteria Options (continued)

| Field Name… | Finds this… |
|---|---|
| *Keywords* | *Any keywords assigned to the item(s)* |
| *Modified* | *The date the original file was most recently modified* |
| *Number of Pages* | *Items matching a particular page count* |
| *Path* | *The file path (location) for the item., including the filename* |
| *Routed To* | *Custom text field that can contain the UserID of the person the item is routed to* |
| *Short Filename Win* | *16-bit DOS path and filename* |
| *Thumbnail Size* | *The item's thumbnail size, in pixels: 32 (icon), 64, 112, 256. (This field will be empty in catalogs converted from earlier versions of Portfolio)* |
| *Vertical Resolution* | *The item's vertical resolution, in dpi* |
| *Volume* | *The physical drive or disk on which the item resides* |
| *Watermarked* | *Items with the indicated watermark* |
| *WatermarkURL* | *Items with the indicated watermarkURL* |
| *Website* | *Custom URL field that can contain a web address* |
| *Width* | *The item's width, in pixels (empty if thumbnails were extracted)* |
| *Zone Mac* | *AppleTalk Zone where item's file is located (empty if cataloged on Windows)* |
| | |
| *Custom Fields* | *Any custom fields that have been created for the current catalog.* |
| *EXIF, IPTC or XMP fields* | *Any of the specialized custom fields for these* |

*Using the Path field name as a search criteria can take a long time, since that field is not indexed by Portfolio.*

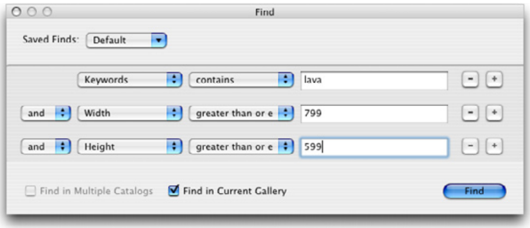
### Searching using multiple criteria (complex searches)

The Find dialog box also allows you to perform more complex searches based on multiple criteria — matching file type, creation date and keyword.

**To perform a complex search:**

1. In the Find dialog box, click the More Choices button (Win) or the "+" button (Mac) to expand the dialog box to include addition criteria.

   You can expand the dialog to include up to five different lines of search criteria.




   After expanding, you can click the Fewer Choices button (Win) or "-" button (Mac) to shrink the dialog box for simpler searches.

2. Configure the search criteria as described in Steps 2, 3 and 4 in the Searching for Specific Items procedure.
3. Set the "And/Or" menu for each search line as needed to refine your search.
4. Click Find to start the search.

   The find results are displayed in the Find Results gallery.

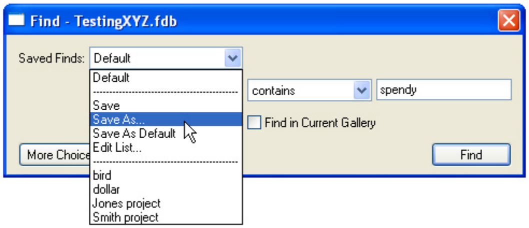
## Saving Finds

If you routinely need to locate particular types of items in a catalog, you can name and save a Find that will retrieve those items.

Your saved finds appear in the Saved Finds drop-down menu in the Find dialog box. Whenever you want to use a Saved Find, choose its name from the menu or select the Find from the drop-down menu using the Saved Finds button on the Toolbar, or double-click the saved find on the Finds palette.

**To save a Find:**

1. Set up your search in the Find dialog box.
2. Choose Save As from the Saved Finds drop-down menu.

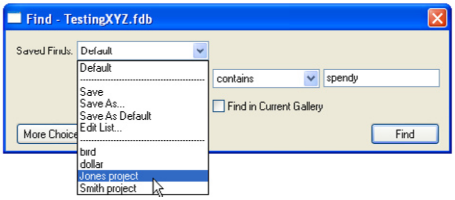



3. Type a name for the new find in the Save Find dialog box.
4. Click OK to return to the Find dialog box. Portfolio stores the search definition you just created in the catalog.

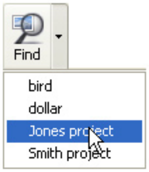
### To use a Saved Find:

You can activate a Saved Find in several ways:

- ***Choose the Saved Find from the Saved Finds drop-down menu in the Find dialog box.***

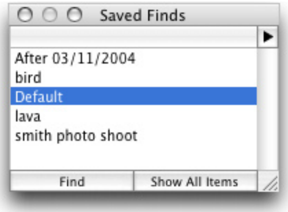



- ***On Windows, choose the Saved Find from the drop-down menu on the Toolbar.***

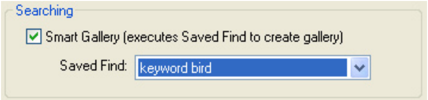



- ***Open the Finds palette (Window > Show Saved Finds) and double-click the name of a Saved Find on the palette.***

- ***Select a Saved Find on the Finds palette, then either click the Find button, or choose Find from the palette's fly-out menu.***




- ***"Attach" the Saved Find to a Gallery (Gallery > Settings > Smart Gallery), so that opening the gallery automatically executes the find.***




### To create a smart gallery from a saved find:

A smart gallery is one that automatically performs a saved find each time it is opened.

1. Open the chosen gallery.
2. Choose Gallery > Settings.
3. In the Gallery Options dialog box, check the Smart Gallery option.
4. Choose your saved find from the drop-down menu.
5. Click OK.

Each time your Smart Gallery is opened, the Saved Find is executed and the results displayed in the gallery.

### To change the attributes of a Saved Find:

1. Choose Catalog > Find (Win) or Edit > Find > Find (Mac) to open the Find dialog box.
2. From the Saved Finds drop-down menu, choose the saved find to modify.
3. Change the search settings.
4. From the Saved Finds drop-down menu, choose Save. The saved find is updated.

— or —

1. In the Finds palette, choose the Find you want to change and the choose Edit Find from the fly-out menu.
2. Modify the search criteria using the standard Find dialog options, then choose Save from the Saved Finds drop-down menu.

**To Rename, Duplicate, or Delete a Saved Find:**

1. In the Find dialog box, choose Edit List from the Saved Finds drop-down menu.

2. In the List Saved Finds dialog box, select the Saved Find that you want to edit.

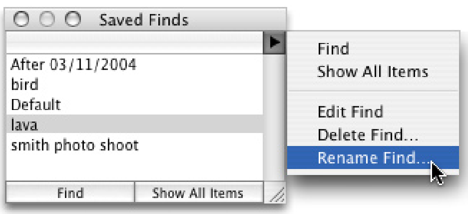
3. Click the appropriate button to Rename, Duplicate or Delete the Find.

4. Click OK to return to the Find dialog box.

— or —

1. From the Finds palette, select the Find that you want to rename or delete.

2. From the fly-out menu, choose Delete Find or Rename Find.



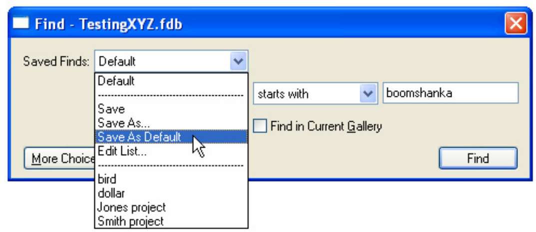

## The Default Find

Each time you open the Find dialog box (or choose Default from the Saved Finds drop-down menu) Portfolio populates the search fields with the attributes specified in the Default Saved Find. You can edit the Default Find so that the Find command will be preset to retrieve the items you use most often.

**To change the Default Find:**

1. Open the Find dialog box and set up the search fields as you want them to be by default.

2. From the Saved Finds drop-down menu choose Save as Default.



## Searching Across Multiple Catalogs

One of Portfolio's most powerful searching features is its ability to find items by searching multiple open catalogs.

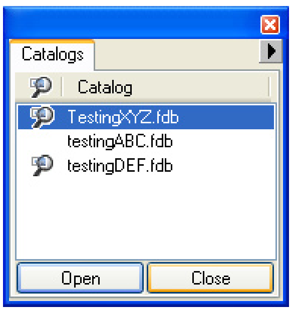
*Portfolio can only search through open catalogs. If you want a search to span multiple catalogs, make sure the appropriate catalogs are open.*

**To search multiple catalogs:**

1. Open all catalogs that you wish to include in the search. Open catalogs are displayed on the Catalogs palette.

   You do not need to include a catalog in a search just because it is open, but you cannot search through closed catalogs.

2. On the Catalogs palette, select the catalogs that you want to include in the search.




   A magnifying-glass icon to the left of a catalog name indicates that the catalog will be included in the search. No icon indicates that the catalog will be excluded from the search.

3. In the **Find** dialog box, enable the **Search Multiple Catalogs** check box in the Criteria panel.


4. Configure the search parameters in the Find dialog box (just as you would for a standard one-catalog search) and then click **Find**.

5. The results of the multi-catalog search are displayed in a new **Multi-Catalog Find Results** gallery.

   Because this gallery now contains items from more than one catalog, it can't be customized, used to create webpages, or to burn items to disc.

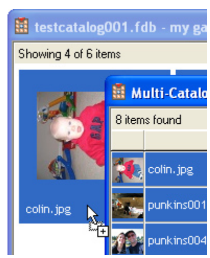
### Saving the results of a multi-catalog find

You can save the results of a multiple catalog find by dragging the images into another gallery. Since galleries are tied to specific catalogs, when you drag a file into a gallery if it was found in another catalog, it is copied to the catalog that owns the gallery.

**To save the results of multi-catalog find (Win):**

1. Choose a catalog and create a new gallery to contain the multi-catalog find results.

2. If the **Multi-Catalog Find Results** gallery is maximized, click the restore button in the upper right hand corner to show the gallery windows.




3. Click and drag the files from the **Multi-Catalog Find Results** gallery window to the new gallery window.

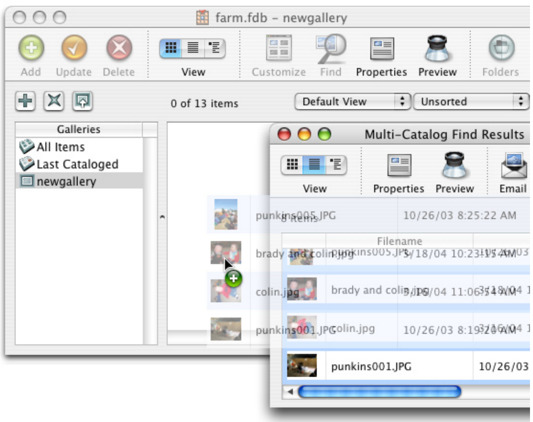
**To save the results of multi-catalog find (Mac):**

1. Choose a catalog and create a new gallery to contain the multi-catalog find results.

*Remember that any files that are housed in other catalogs will be copied to the new gallery and catalog.*

2. Portfolio on Mac OS X displays galleries as separate windows, so copying files is easy.

   Click and drag files from the **Multi-Catalog Find Results** gallery to either the gallery window, or onto the gallery name in the Galleries pane.




## Finding Placeholder Items

You can easily locate all of the placeholders that you created to keep track of which placeholders you have created, need to update or delete.

**To find all Placeholders:**

1. Choose **Catalog** > **Find Other** > **Placeholder Items** (Win), or choose **Edit** > **Find** > **Placeholder Items** (Mac).

## Finding Document Text

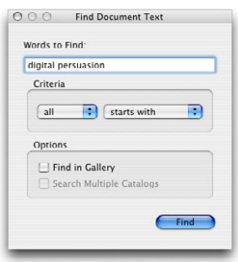
The Find Document Text command allows you to find words or phrases within the text of cataloged documents, as opposed to in the catalog item.

***Portfolio only indexes text found in plain text files and PDF documents. When cataloging these files, you must also have the Index Document Text option selected in the Advanced Cataloging Options dialog box.***

**To find text in a cataloged document:**

1. Choose **Catalog** > **Find Other** > **Document Text** (Win) or choose **Edit** > **Find** > **Document Text** (Mac).

2. Enter the words or phrases that you wish to search for in the **Words to Find** text box.



3. From the Any/All drop down box, choose **All** to require all of the search words in found documents, choose **Any** to only require any of the search words.

4. Choose the match option from the drop-down menu. These options are the same as the regular Find command.

5. To restrict your search to the current gallery, or to find across multiple catalogs, choose the appropriate options.

6. Click **Find** to start the search.

## Finding Missing Originals

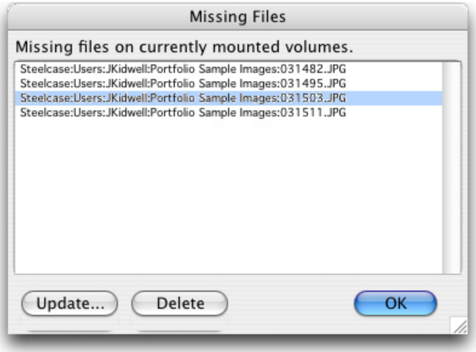
The Find Missing Original command is a specialized search that verifies that there is still a valid path pointing to an original file for each item in your catalog. If Portfolio can't find a file on disk corresponding with each catalog item, it lists the missing originals so that you can either update your catalog or delete the items.

***The Find Missing Originals command only searches on mounted drives. For example, archive CDs and unmounted network drives are not included in the search.***

**To locate missing files:**

1. Choose **Catalog** > **Find Other** > **Missing Originals** (Win) or choose **Edit** > **Find** > **Missing Originals** (Mac), or press or Ctrl-M (Win) or Command-M (Mac).

2. Any missing items are displayed in the Missing Files dialog box.




3. To update or delete any of items for which an original is missing, select the missing item in the list, then click the Update or Delete buttons.

## Notes on Searching

Keep the following points in mind when working with the Portfolio search engine:

### Indexing

Portfolio indexes all fields to speed searching. Fields, including Text Block custom fields are indexed at the word level, which means that you can search these fields quickly by individual words but not by phrases.

When you search on indexed fields, choose “matches” or “starts with” from the modifier drop-down menu for the fastest possible searches. Searches using “contains” or “ends with” can be slower when working with very large catalogs.

### Date/Time Fields

Times are always assumed when searching fields of the type “Date/Time,” even if a time is not entered, and when the “Display Time” option for the field is disabled. That is, if a time value was entered into the field (either by extraction from the source file when the item was cataloged or by entering a time in the field) and then hidden by turning off “Display Time,” the time will still be noted by Portfolio when a search is requested.

For example: Searching for “9/15/99” will not find an item that contains “9/15/99 3:00 pm” because the request is interpreted as “9/15/99 12:00:00 am.” This is true even if the time is not being displayed.

***Portfolio stores dates following the computer’s Date and Time settings. If Short Dates are used, Portfolio only records the last two digits of the year, possibly resulting in erroneous find results. To avoid this potential problem, use the operating system’s Long Dates format.***

# Distributing files with Portfolio

Ultimately, most of the digital files you work with every day probably end up going somewhere. You may email documents to colleagues, burn images to a CD, upload files to a remote file server, or publish them on a website.

That's why an important aspect of managing your digital files is being able to quickly and easily distribute them to other users. Portfolio is equipped with several features designed to greatly streamline the job of collecting and sending your files to other users. This chapter covers:

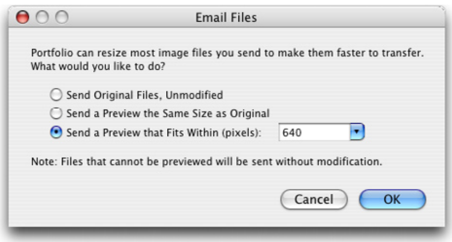
- ***Emailing files from Portfolio***
- ***Collecting and burning files to disc for archiving and publication***
- ***Creating webpages from cataloged files***
- ***Creating slideshow presentations of your files***

## Emailing files

Portfolio now makes it possible to email images, low resolution previews, and other digital media files to other users from within a Portfolio catalog. Portfolio connects directly to your computer's email program. This provides a convenient way to distribute images or send out proofs without having to manually launch your email program or open an image editing program to change the image resolution.

**To email a file from Portfolio:**

1. Select the item (or items) that you want to send from the current gallery window.
2. Click the Email button  on the Toolbar. Portfolio prompts you to choose how to transfer the file - send the original file, a low-resolution preview, or a preview of specific pixel width.




3. Choose an option and click OK. Portfolio launches the default email program on your system, creates a new email message, generates previews if the preview option is chosen, and adds the file(s) you selected as an attachment.
4. A new email is automatically created in your email program. Address the email and fill in the subject and body text as usual.

***While there's no inherent limit to the size or number of items that you can attach to an email from within Portfolio, your email client software, network email server and/or your internet service provider may have limitations on the size of attachments. If you have very large attachments, it might be better to collect these together using Portfolio's Collect command, and then transfer them over the internet using FTP.***

## Burning files to disc

A powerful new feature in Portfolio 7 is the ability to burn a CD or DVD directly from Portfolio - no other CD/DVD creation software is required.

***The Burn to Disc feature is operating system dependent, and is not available on Windows 2000. On this operating system, use the Collect command to gather your files and then create your disc with an external burning application.***

The Burn to Disc feature can be used to create archives of original files in your catalog, create a disc of preview images for a client, or even publish copies of your original files.

The files on your disc can be automatically added to a new Portfolio catalog. To allow others to open and view your catalog, you can automatically include the Portfolio Browser — a simple, read-only version of Portfolio. This makes sharing files with others a simple procedure.

***You may freely reproduce and distribute the Extensis Portfolio Browser (version 7) only for non-commercial use. If the Extensis Portfolio Browser is distributed as part of a stand-alone retail or commercial product for sale, then you must contact Extensis Customer Services and execute a Portfolio Browser License Agreement with Extensis in order to be authorized for multiple distribution rights set forth in Subsection 2.9 of the End User License Agreement.***

As with previous versions of Portfolio, you can use Portfolio to collect files that can be burned later onto a disc. See Collecting Files later in this chapter for further details.

**To start burning a disc:**

1. If necessary, confirm that any external CD or DVD burning devices are connected to your computer.
2. Insert a blank disc into the drive.
3. In the Galleries pane, open a gallery of the items that you want to burn to disc. All items in the gallery will be used to create your disc.

***Portfolio supports burning files that are in only one catalog. This option is unavailable for a gallery that contains items from more than one catalog.***

4. Choose Gallery > Burn to Disc

   – or –

   Click the Burn to Disc button on the toolbar.

5. In the Burn to Disc dialog box, follow either of the following procedures: Publishing original or preview files to disc, or Archiving original files to disc.

### Publishing original or preview files to disc

You can use Portfolio to publish files to discs that can easily be shared with others. These discs can include the original full size files, or automatically re-sized smaller preview files.

**To publish files to disc:**

1. Follow the previous procedure to start burning a disc.
2. In the Burn to Disc dialog box, enter a volume name for your disc. This is the name that is displayed in the Windows Explorer and Macintosh Finder when you insert the disc into a drive.

3. Choose one of the following three file options:

   - ***Original files, unmodified - include the original full-size files***
   - ***Low Res JPEG's the same size as original***
   - ***Low Res JPEG's the that fit within X- choose this option to re-size files and make them fit within a specified pixel width.***

*Do not choose to **Link Paths in Catalog to Files Burned to Disc**. This option is used only to create an archive disc.*

***If you choose to use Low Res JPEG's and Portfolio is unable to create a preview of a specified file, Portfolio gives you the option to include the original, or skip the file.***

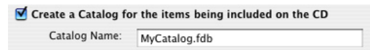
4. Enter a folder name within which to include the files.

5. If desired, check the option to organize files into a matching folder hierarchy. This option creates a subfolder hierarchy on your disc that matches the subfolders of the original files.

***If there is a possibility that any of your files have the same file name, to avoid naming conflicts, it is recommended that you enable this option.***

Portfolio can create a Portfolio catalog of the files that are burned onto the disc. The items in the new catalog are linked to the new copies of your files. The new catalog created is a clone of your original catalog, and preserves all of your custom fields, data, and saved views. You can also include the Portfolio Browser — a simple, read-only version of Portfolio. The new catalog includes thumbnail images, saved views, basically everything a user needs to view the included files.

6. If desired, check the option to include a catalog, and enter a name for that catalog.




7. To include the Portfolio Browser application on your disc, check the appropriate option. On a Mac you can include both the Macintosh Browser Application as well as the Windows Browser.

8. Note the total size of your collection (in megabytes) in the Estimated Size field near the bottom of the dialog box to make sure you have sufficient room on the target volume for the collection.

9. Click Burn to create your disc.

***If your final disc requires more space than allowed on your disc, the burn process cannot be completed. To lower the space required: remove files from your gallery, include only re-sized JPEG's rather than original files, or choose to not include the Portfolio Browser and associated catalogs.***

## Archiving original files to disc

At times you may want to create archive discs of your original files. When you create an archive disc, your original files are copied to disc and your catalog is updated so that it now points to the archive disc. Your catalog still contains thumbnail and preview images of archived files, but when you choose to open an original file, Portfolio prompts you to insert the archive disc.

**To archive files to disc:**

1. Follow the previous procedure to start burning a disc.

2. In the Burn to Disc dialog box, enter a volume name for your disc. This is the name of your archive disc, and what is displayed in the Windows Explorer and

Macintosh Finder when you insert the disc into a drive.

If you plan to create many archive discs, it is wise to choose a logical volume naming convention for your archive discs, for example ARCHIVE001, ARCHIVE002, etc. This allows you to effectively organize and quickly locate your archive discs.

***The volume name length is limited to a maximum of 16 characters.***

3. On a Mac, choose Original Files, and Link Paths in Catalog to Files Burned to Disc.

   In Windows, choose Original Files and check the option to Link Paths in Catalog to Files Burned to Disc.

4. Enter a folder name within which to organize the original files on disc.
5. If desired, check the option to organize files into a matching folder hierarchy. This option creates subfolders on your disc that match the subfolder locations of the original files.

When you create an archive disc, the source catalog is updated to point to the new location of the original files. You can also create a new catalog on the disc that only contains the files burned to the archive. This is not necessary, but can be handy when you only want to browse a catalog of files on a specific archive disc.

6. If desired, check the option to include a catalog, and enter a name for that catalog.

   ***For convenience, you may wish to use a name similar to your archive volume name.***

7. To include the Portfolio Browser application on your disc, check the appropriate option.

   On a Mac you can include both the Macintosh Browser Application as well as the Windows Browser.

8. Note the total size of your collection (in megabytes) in the Estimated Size field near the bottom of the window to make sure you have sufficient room on the target volume for the collection.
9. Click Burn to create your archive disc. When the burn process is complete, the burn session is closed and no other files can be added to the disc.

   ***If your final disc requires more space than allowed on your disc, the burn process cannot be completed. To lower the space required: remove files from your gallery or choose to not include the Portfolio Browser and associated catalogs.***

After you burn your archive disc, the original files still remain on your system and the catalog now points to the archive disc. If desired, you can now manually delete the original files from your system using the Finder (Mac) or Explorer (Win).

## Collecting files

As a Portfolio user, you might frequently find it useful to collect together a group of cataloged files, copying the files from their various locations on your computer system or network into a single location. Much like the Burn to Disc command, the Collect command copies and collects files, can create a new catalog containing those files, and even create a copy of the Portfolio Browser — a simple, read-only version of Portfolio.

Here are some of the ways you might want to use the Collect feature:

- ***Copy files scattered across your network on to a single location.***
- ***Copy a select set of files to a new folder on the network so others can use and access them***
- ***Create a new catalog containing only the files you select (leaving your original catalog unchanged) and send this along with its associated files to another user.***
- ***Gather files to a single location for inclusion on a CD or DVD that includes your Portfolio files as well as any other desired content. This is a benefit of using the Collect command over the Burn to Disc command.***
- ***Gather low resolution JPEG images for distribution and review.***

### Organizing files to collect into a gallery

Portfolio's Collect feature operates on a whole gallery of files at once. Therefore, the first step when using it is to set up your current gallery so that it contains only the files you want to include in your collection. You can do this by:

- ***Performing a search that reveals only the files you want to include.***
- ***Creating a new gallery (by choosing Gallery > New) and then dragging only the items you want into the new gallery.***

### Organizing files by folder hierarchy

When collecting files, Portfolio gives you the option to organize files into a matching folder hierarchy of your original files. By default, this option is turned off, meaning that Portfolio collects all the files into a single folder — regardless of how the originals were arranged on disk.

If you turn on this option in the Collect dialog box, Portfolio reconstructs the entire nested folder structure of the collected files when it copies them, exactly mirroring the hierarchical arrangement of the originals. The hierarchy always starts with the topmost (parent) folder that contains all the files you've selected.

### Creating a catalog

If you turn on the Create Catalog option in the Collect dialog box, Portfolio automatically creates a new catalog for the files you are collecting. The items in the new catalog are linked to the new copies of your files, not the originals.

The new catalog created by the Collect command is a clone of your original catalog, and preserves all of your custom fields, data, and saved views. This makes it easy to distribute catalogs with exactly the look and style that you want.

***It is not recommended that you save the new catalog into the same folder as the collected files, as this might make it difficult for users of your collection to locate and open the catalog file itself. Instead you might save the catalog to the root level of your destination and collect the files into a separate subfolder called "Images."***

### Setting a volume name (Windows only)

When creating a CD in Windows, it's critical that you correctly set the name of the volume, so that the paths in your new catalog point to files on CDs that you create and not to your own hard drive or network volume. Enter the name of the CD volume that you intend to create in this field, and your new catalog will include that name in the final path for your collected files.

### Including the Portfolio Browser

The Portfolio Browser is a free read-only version of Portfolio. The Browser application allows users to open a Portfolio catalog, view thumbnails and previews, perform searches using keywords and other criteria, but it doesn't allow them to add, edit or remove items from a catalog. It also doesn't connect to catalogs served by Portfolio Server in a networked environment. The Collect feature has the ability to create and include the Portfolio Browser with your collection automatically.

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### To collect files with the Collect command:

1. Make sure the files you want to include in your collection are in the current gallery.

2. Click the Collect button on the Toolbar.

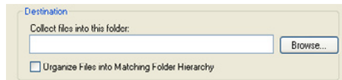
   – or –

   Choose Gallery > Collect.

3. Choose the type of file to collect: Original files, Low Res JPEG's or, Low Res JPEG's that fit within a specific width.

   ***If you choose to use Low Res JPEG's and Portfolio is unable to create a preview of a specified file, Portfolio gives you the option to include the original, or skip the file.***

4. Choose a destination for the collection.

   Click the Folder button (Macintosh) or Browse button (Windows) to select a folder into which your new collection will be copied. You can select an existing folder, or create a new one in the Choose a Folder/ Browse for Folder dialog box.

   ***On a Mac: If you want to burn the collected files to a CD, and have any included catalogs function properly, insert the CD into the drive, and choose the mounted volume as the destination.***

5. Check the option to organize files into matching folder hierarchy if you want Portfolio to copy the collected files into hierarchical folders.

   Leave this unchecked if you want the files collected into a single folder.

6. If you want to create a new catalog for the collection, check the Create a Catalog option.

   If you don't need a new catalog for the files you are collecting, leave this option unchecked. If you turn it on, specify a name and location for the new catalog.

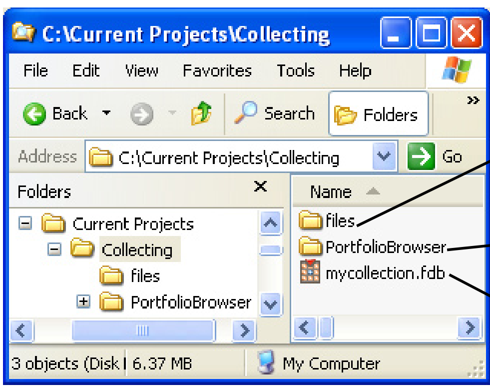
*The Create a Catalog command won't work if other users are logged into the catalog. This is because Portfolio must ensure that no changes are taking place in the catalog when cloning it. Make sure that no other copies of Portfolio (or the Portfolio Express palette) have the catalog open when you use create an archive catalog.*

7. In Windows : If you are burning the collection to a CD, turn on the "Use this Volume name in the new Catalog" and fill in the name that you will ultimately give to the CD, so that the paths in your archive catalog will work correctly.

8. Turn on the Include Browser check box if you want to create a copy of the free Portfolio Browser for inclusion with your collection. This option is available only if you have chosen to create a new catalog for the collection.

   On a Mac you can choose to include both Mac and Windows versions of the Portfolio Browser.

9. Note the total size of your collection (in megabytes) in the Estimated Size field near the bottom of the window to make sure you have sufficient room on the target volume for the collection.




*Collect the files themselves into their own root folder. Include as many subfolders as you want.*

*Include the free Portfolio Browser, which is collected into its own folder*

*Keep the archive catalog file separate from the files and easily accessible*

10. Click Collect. Portfolio makes copies of all the items in the current gallery and creates a catalog and browsers according to the options you specified.

## The Collect command and disc burning

The Collect feature is perfect to collect files for inclusion on a CD or DVD. When you want to include additional files as well as files from Portfolio, the Collect command handles most of the tasks involved — copying files to a destination disk, creating a new catalog for the files, and generating a copy of the Portfolio Browser.

After you use the Collect feature, you will need to use external disc burning software to burn your collected files to disc.

## How to set up a CD using Collect

When using the Collect feature to gather images to be burned onto a CD or DVD along with a catalog and a copy of Portfolio Browser, you can organize the collected files however you want, but a structure similar to the one shown below is strongly recommended.

When burning a disc on a Windows machine, be sure to use the same volume name in your CD creation software that you set in the Collect dialog.

## Web Publishing with Portfolio

Portfolio 7 offers two different levels of web publishing support. On the more basic level is the Create Webpages Assistant. This tool makes it extremely easy to create webpages from your Portfolio catalogs without having to build pages from scratch or work directly with HTML code. The webpages generated using the Create Webpages Assistant are static webpages — a frozen "snapshot" of your Portfolio content at the moment you export it.

On a more sophisticated level is Portfolio NetPublish. This powerful tool gives you the ability to dynamically publish your portfolio catalogs to the web. With NetPublish webpages, as you add and modify your catalog, web users can see your changes on the web in real time. The Portfolio Netpublish Assistant is automatically installed with the Portfolio client. To test the abilities of NetPublish, you must also install NetPublish Server, and to allow multiple users to connect to your NetPublish pages, you must purchase a separate license for NetPublish Server. If you wish to test NetPublish without a serial number you are allowed one user connection per hour. For more details about system requirements and installation, see the NetPublish User Guide.

### Creating Webpages

The Create Webpages feature is designed to help you turn your catalogs into polished webpages with just a few clicks. The intuitive Create Webpages Assistant walks you through each step to create professional-looking webpages.

Depending upon the site template that you choose, there can be up to five easy steps to create your site.

The Assistant walks you through the following steps to configure each page of your site.

#### Create Webpages steps

***Welcome*** *- lists the catalog name and number of images selected to export.*

***Start*** *- choose a website layout for your site.*

***Site*** *- set global settings for all of the pages of the site here. You can also add a "Welcome page" to your site.*

***Gallery*** *- configure how your images are displayed in the web page.*

***Detail*** *- configure the detail page where typically a single higher resolution image and other detailed information is displayed.*

***Export*** *- set the export location and save any template modifications for later.*

#### To create webpages of selected images in a Portfolio gallery:

1. Select the thumbnails of the images that you want to include on your webpages.

   The Create Webpages command acts only on selected items. If you want to include all the images displayed in your gallery window, choose Edit > Select All.

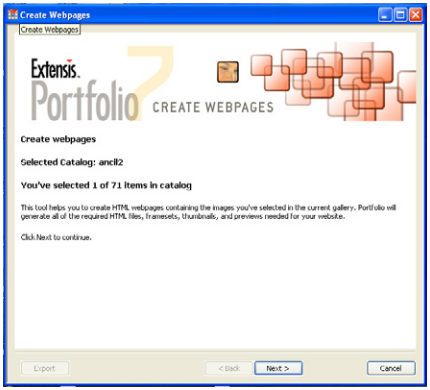
2. Choose Item > Create Webpages.

   The Create Webpages Assistant is displayed. The Assistant guides you through each step of the process. The following pages include detailed information about each step.

***As with any HTML code, results will vary based on what make and version of browser the viewer is using. It is recommended that you test the generated results with any browsers with which you anticipate your visitors might access the pages.***

## Welcome Step

The welcome step lists the catalog and how many images you have chosen to export. Choose Next to move through the steps of the Assistant.




## Start Step

In the Start step you have the opportunity to choose from eight professionally designed templates. You can also duplicate and then customize those templates to your specific needs.

At the top of the step, the Assistant path tells you where you are in the export process. When you click on each site icon, a detailed description of that template is displayed.

Each template contains specific page layout and design information, so the Assistant displays only the options and pages that you can configure for that template.

*During any step from this point forward you can click Export. This accepts the default settings for all of the subsequent steps up to the Export step of the process.*

**To use one of the predesigned templates:**

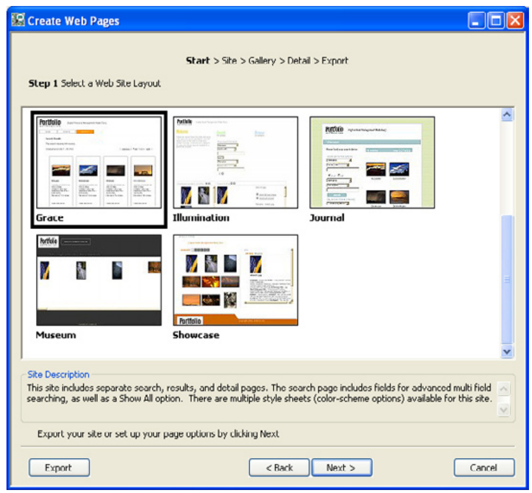
1. Click to highlight the template icon.
2. Click Export to accept the site with all of the default settings.

– or –

2. Click Next to customize the pages of the template.

To save any custom changes to a template you can duplicate the template at this step, use the Save a Copy button in the Publish step, or use the View Source button at each step of the Assistant to view and edit the source code.

You cannot save template changes directly to the default templates. This ensures that you always have access to the default templates.



**To duplicate a template:**

1 Right-click (Win) or Ctrl-click (Mac) the site icon and choose duplicate from the menu.

2. In the dialog box, enter a name for the new template and click OK.

3. Click to highlight the new site template icon.

4. Click Next to start customizing the pages of the template.

***On the Export page of the Assistant, you are given the option to save your template, making it available to reuse in the future.***

If there are a number of templates that you don't think you'll ever use, you can hide them from view. Hidden templates are not deleted and can be unhidden at any time.

**To hide a template:**

- Right-click (Win) or Ctrl-click (Mac) the site icon and choose Hide from the menu.

**To unhide a template:**

1. Right-click (Win) or Ctrl-click (Mac) any site icon.

2. Point to Unhide and choose:

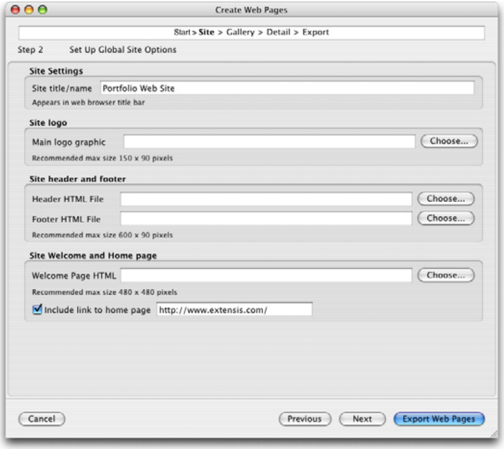
   - Unhide All to show all hidden templates.

   – or –

   - The specific template name to unhide.

## Site Step

In the Site step you designate global site options. These are items that are displayed on all of the pages of your site.




### Site settings

In the site settings box, enter text that you want to appear in the title bar of the browser when viewing the site.

### Site logo

You can choose a custom graphic that appears on all pages. This could be a graphic of your business name, or a graphic description of the group of images being exported.

You can use a `JPG`, `GIF` or `PNG` file with a recommended maximum size of 150x90 pixels.

To change the default logo graphic, click the Browse button and navigate to the location of the graphic.

*Graphic files, HTML and other files can be located at any location on your computer. The Assistant automatically collects all of the pieces when you export the site.*

### Site header and footer

The site header and footer can contain text or HTML. This can be used to create a look that matches other sites currently in use, to include website navigation buttons, or whatever you choose.

The recommended maximum dimensions of the header and footer is 600x90 pixels.

To change the Header or Footer file, click the Browse button. The file you choose is automatically copied and renamed `header.html` or `footer.html`.

*Even though not listed specifically in the Assistant, when using a default template, a header, footer and site logo are always included, unless you browse to new headers, footers or logos.*

### Welcome page

The Welcome page is the first page displayed to users of your site. It can contain instructions about how to navigate your site, or any other important information.

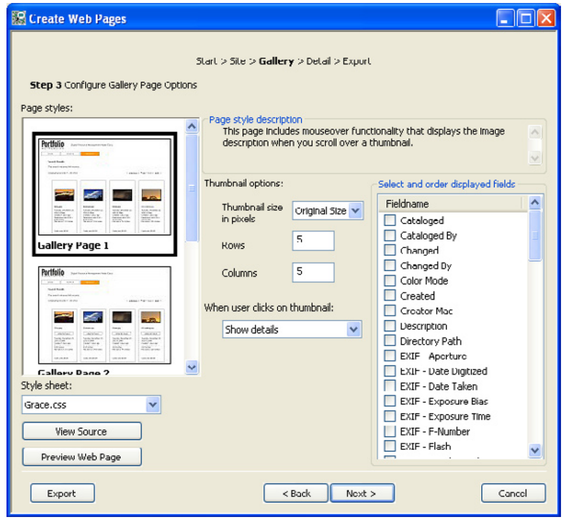
The Welcome page can be up to a recommended maximum size of 480x480 pixels and can contain text or HTML.

### Include link to homepage

Check this option to include a link to your homepage on every page. In most templates, the logo graphic is a link itself, and uses the URL that you enter into this text box.

## Gallery Step

The Gallery step is where you define the page that displays . In this step you designate the page design, thumbnail size, data field information displayed, and more.




### Page style

The first step is to choose a gallery page style. Page styles define the general functionality of the page as well as the “look and feel” of the page. The page style determines what items are displayed where. The default page style is selected until you choose an alternate.

### To choose a page style:

- Click to highlight a page style icon.

### Style sheet

Depending upon the site you choose, there can be multiple style sheets from which to choose. Style sheets control the color scheme of the site, typically the background and text color of each item on your final page.

### Show item count per page

Check this option if you want to display the total number of items in the website, and which ones are being viewed. For example, “Items 1-20 of 40.”

### Thumbnail options

Use the thumbnail options to set the size of the images displayed, layout in rows and columns, and what happens when the user clicks on an image.

Thumbnail size is directly dependent upon the size of thumbnails in your catalog. If you choose “Original Size,” then the thumbnail size in the catalog is used.

***If you choose a thumbnail size larger than that in your catalog, you will likely have degradation in the display quality of the thumbnail. So, if thumbnails in your catalog are created at 112 pixels, you should not enter a thumbnail size larger than 112. Make sure to preview your page as you choose new settings.***

Choose from the drop down menu what should happen when a user clicks the thumbnail. Choose Detail to have the Detail page displayed. The other options are self explanatory.

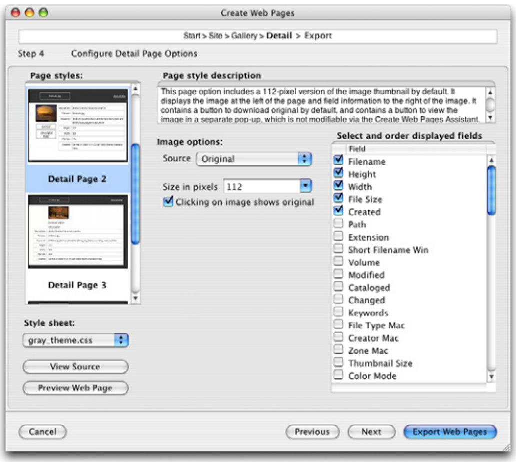
### Display fields

Depending upon the page style, a wealth of data fields can be displayed. Check each data field that you would like to include, then click and drag them into an appropriate display order.

***When choosing an order for display fields, it is best to group fields by how they will appear to a user on the page. Fields can be displayed as a Text Box, Pull-down menu, or hyperlink depending upon the data type. The default template settings typically group the fields in this order Text Box, Pull-down then hyperlink.***

## Detail Step

A detail page is a page where only one image is displayed, typically at a larger size and better quality than the thumbnails shown on other pages. In this step you choose the detail page options.




### Page style and style sheet

The page style and style sheet options operate like those on the previous page. Click to highlight a page style and choose a style sheet from the drop down list.

### Image options

You can choose what image is displayed, the size of that image, and what happens when a user clicks the image.

The image Source refers to what image is used to create the image for the user. Choose one of the following:

- ***Original to display the original image. If you use this setting, be sure to set a specific image size in the next field.***
- ***Preview to use a screen preview from the catalog. If your catalog does not contain screen previews, your original image is used.***
- ***Thumbnail to use the default thumbnail from the catalog.***

When you set a size other than Original, the image is resized by NetPublish and displayed at the chosen size.

*If you choose "Original" for both the image size and source, files that cannot be displayed by a web browser (such as TIF, PSD, etc) will not display a detail image. To fix this issue, choose a specific image size, so NetPublish can automatically create an appropriate detail image.*

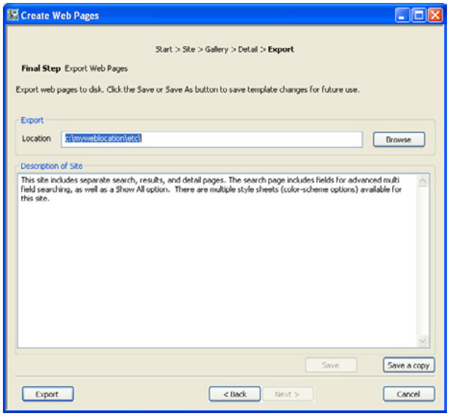
To add a link or button that allows the user to open the original file check the Clicking on image shows original option.

### Display fields

Depending upon the page style, a wealth of data fields can be displayed. Check each data field that you would like to include, then click and drag them into an appropriate display order.

## Export Step

In the Export step you indicate where to export your site and also save a copy of your template.




### Saving a copy of your template settings

After you have made all of your selections, you may want to save what you've selected so you can use the same settings again. To do so, enter a description of your site and click the Save a Copy button. The next time you use the Create Webpages Assistant, your template will be listed along with the other default templates.

### Exporting your site

1. Enter a directory in the Location box.

   – or –

   Click the Browse button and navigate to the desired directory location.

2. Click Export.

*Depending upon the number of items selected, exporting your site can take a great deal of time.*

## Editing the source code

Click the View Source button to view the source code for the selected page in a basic text editor. This tool can be handy to make minor adjustments to the predefined code.

In the editor, you can:

- ***Directly edit the source code for the page.***
- ***Preview your changes in the default web browser.***
- ***Export the current source code to a file.***
- ***Import a file to replace the current source code.***
- ***Save/Save As the edited source file.***

***You are only able to choose Save if you are working on a duplicated, customizable site. When working with one of the professionally designed sites, you must choose Save As and create to a new file.***

***When editing the source file, it is possible to break functionality and cause the resultant site to not function properly. Edit the source files with caution.***

It is recommended that you choose all of your page settings before you view the source. This way you can better understand the parameters set by the Assistant, and be less likely to break page functionality.

Click the Close button to return to the Assistant.

## Slideshows

The Portfolio Slideshow feature lets you create slide shows from your catalog images (not thumbnails) that can run automatically—with the images being advanced in specified intervals — or that can be manually advanced. You can even save slideshows as standalone QuickTime movies, so that you can distribute them to other users.

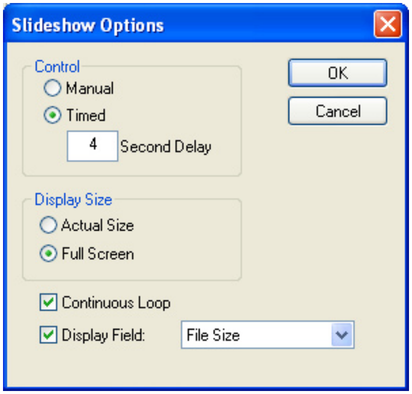
Portfolio uses the files in the active gallery for the slide show. The screen is blanked and the images are displayed against the background color of the current gallery view. You can elect to show images at their actual image size, or to have them scaled up to fit as much of the display screen as possible. (If an item is too big for the screen, it is automatically scaled down.)

When locating items for a Slideshow, if a screen preview is available, it will be displayed. If no screen preview is found and the source file cannot be found, the item thumbnail is displayed.

**To set Slideshow Options:**

1. Choose View > Slideshow Options.

2. In the Slideshow Options dialog box, choose from Manual or Timed in the Control section. With a manual slideshow, you advance from image to image using the arrow keys, or the VCR-like onscreen slideshow controls. A timed slideshow advances from slide to slide automatically. You can set a time delay of up to 99 seconds.




3. Choose a display size. Actual Size displays the images at the actual size of the source file image. Full screen allows Portfolio to scale the image up to fit the display screen. In all cases, if the image is too large, it is scaled down to fit.

4. Set the other slideshow options.

   Check the Continuous Loop check box if you're creating a slideshow and want it to loop continuously. If you want to display a field with the images in the slideshow — the filename, for example, or a caption saved in a custom field — check the Display Field check box and select the field from the drop-down menu. When you run the slideshow, the field text appears along the bottom of the screen (in the font being used in the current gallery) under the images.

5. Click OK when you've adjusted all the settings. You're ready to run your slideshow.

**To run a Slideshow:**

1. Create a gallery that contains all of the items that you would like in the slideshow.
2. Click and drag the items in the gallery into the order in which you want them to be shown.

*A slideshow can contain still images, 3D images, movies, and sounds. Anything that can be previewed in Portfolio can be displayed in the slideshow.*

3. Choose View > Slideshow, or press ⌘-Shift-S (Mac) or Ctrl-; (Windows).
4. For manually run slide shows, use the arrows on the controller to move to the next or previous item. Alternatively, you can use the left or right arrow keys on your keyboard to move back and forth through a show. Use the Home or End keys to move to the beginning or the end of the show.

Timed slideshows begin automatically, but you can stop and start the presentation and restart using the pause button on the mini-controller.

If the Slideshow is not on “Continuous Loop” it will end when the last item has been displayed.

5. To stop the slideshow and return to the gallery window, press the Stop button on the controller, or just press Esc on your keyboard.

*Keep in mind when using a timed delay that images do not start loading until after the delay period and it can take up to a few seconds for larger images to load.*

## Edit during Slideshows

The manual controller allows you to do many things with files during a slideshow:

Delete the item from the Portfolio catalog.

Delete the original file.

Copy the original file.

Move the original file.

Rename the original file.

With these controls, you can use a slideshow to preview a number of images at full-screen and organize them as you go.

## Auto-starting slideshows

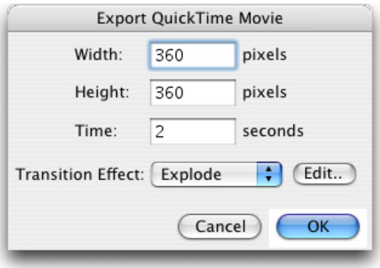
You can also have a slideshow run automatically when a catalog is opened. To set this up go to Catalog > Administration and open the Startup tab (this requires that you have administrative access to the catalog). In the On Startup section of the panel, enable the Run Slideshow check box.

## Saving a slideshow as a QuickTime movie

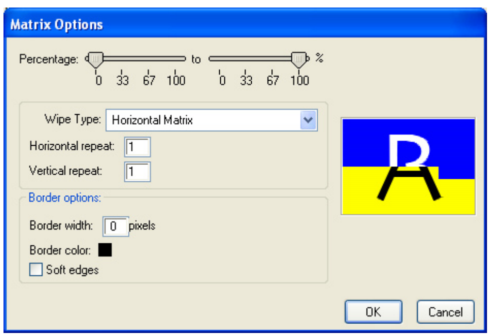
The Export QuickTime Movie option exports items in your catalog and saves them in QuickTime movie format. You can specify transitions for the movie when the slideshow is exported.

**To export a slideshow as a QuickTime movie:**

1. Open the gallery that you'd like to export as a QuickTime slideshow.
2. Choose Item > Create QuickTime Movie.




3. Set the movie size (in pixels), the timing of each slide and choose a Transition Effect from the drop-down box.
4. Click the Edit button to configure the transisiton effect. Each effect has options specific to that effect.




Set the transtion options and click OK.

5. Click OK to accept the QuickTime movie settings.
6. Choose a file location and name for movie file.
7. Click "Save."

***If the original image (the item's source file) cannot be found when the Slideshow is exported, the catalog thumbnail is exported instead. If you export a QuickTime movie file (.mov), the resulting movie file will be blank.***

# Using the Portfolio Express Palette

The Portfolio Express palette is a floating palette that makes the contents of your Portfolio catalogs instantly available within any application, at any time, via a global keyboard shortcut. It allows you to find, copy, open, and use any file you've cataloged — without even launching and opening Portfolio. The palette displays small thumbnails of each item in your catalog along with its filename.

Some of the ways you can use the Portfolio Express palette include:

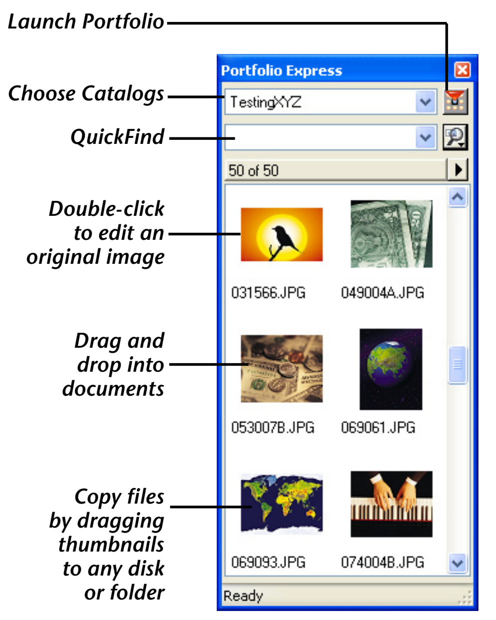
- ***Locate images quickly using the palette, then double-click them to open them in Adobe Photoshop, or any other image-editing software you specify.***
- ***Open the palette and drag an image into any drag-and-drop sensitive application, such as Microsoft Word or Adobe InDesign.***
- ***When writing an email message, grab a file and the palette and drag it on to the message to attach the original file.***
- ***Grab logos, clip art, or other images from the palette and drag them straight into a PowerPoint slide or Word document.***
- ***Find any image on disk with unprecedented speed by simply pressing the Portfolio Express hot key, selecting the image on the palette and choosing the Reveal in Finder/Reveal in Explorer command.***

The Portfolio Express palette is designed to provide quick, easy access to your images from anywhere on your system. It doesn't allow you to catalog new items in Portfolio, edit existing Portfolio records, add keywords, or perform any other file management tasks.

The job of the Portfolio Express palette is make it easy for you to grab cataloged items and use them. To edit your Portfolio catalogs and do any other file management, use the main Portfolio application (which you can launch from the palette).

The Portfolio Express palette runs entirely in the background, so you won't see an icon appear for it in the Macintosh Dock or the Windows Toolbar.

**Portfolio Express Palette**



## Setting up Portfolio Express

The Portfolio Express palette is a separate and distinct application from Portfolio. By default, it is installed in the same folder as the main Portfolio application.

**To launch Portfolio Express for the first time:**

**Macintosh:** To launch Portfolio Express, double click the Portfolio Express icon. On the Macintosh the Portfolio Express is not installed as an auto-start application by default.

**Windows:** The Portfolio Express palette is installed as a startup application, and should be running in the background. Press the default hot key (Control-Shift-P) to make the palette visible, or double-click the Portfolio Express icon in the System Tray .

If the Portfolio Express application isn't running in the background, choose Start > Programs > Extensis > Portfolio > Portfolio Express.

## Configuring Portfolio Express palette as a startup application

Having Portfolio Express start and run automatically in the background makes it possible for you to access your images the moment you need them by simply pressing the Portfolio Express palette hot key.

On the Macintosh, the Portfolio Express palette is not initially configured to automatically start when you turn on your machine.

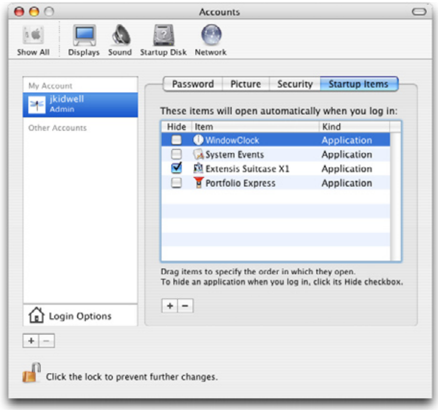
**Making Portfolio Express auto-start on Macintosh:**

1. Open the System Preferences dialog box.

2. Open the Accounts window.

3. On the Startup Items tab, click the "+" button.

4. In the Add dialog box, navigate to the Portfolio 7 directory. Click to highlight the Portfolio Express icon and click Add.




The next time you start up your computer, Portfolio Express launches automatically.

**Making Portfolio Express auto-start on Windows:**

1. In the Windows Explorer, navigate to \\Documents and Settings\All Users\Start Menu\Programs\Startup.

2. Open a new Explorer Window and navigate to where you installed Portfolio 7. This is typically:

   \\Program Files\Extensis\Portfolio 7\

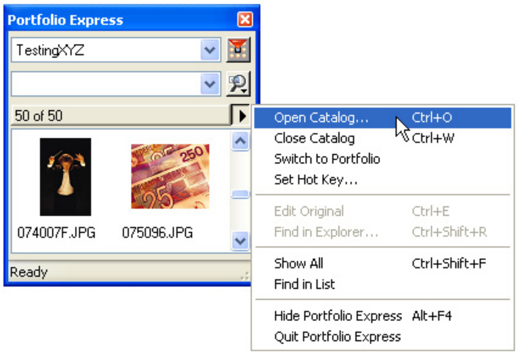
3. From the Portfolio 7 folder, Alt-Click and drag the Portfolio Express icon to the Startup menu.

   A shortcut is created to Portfolio Express. The next time you restart your computer, Portfolio Express will automatically start.

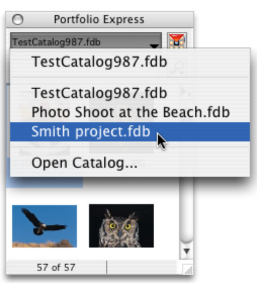
## Opening Catalogs with the Portfolio Express palette

The first time you launch the Portfolio Express palette, the palette is blank, with the words "no open catalogs" displayed in the catalog menu.

To open a catalog, choose the Open Catalog menu from the fly-out on the right side of the palette.




To open a recently-used catalog, choose it from the catalog menu on the palette. The Portfolio Express palette remembers the last several catalogs you've opened. If the catalog you want to open isn't on the menu of recently-used catalogs, choose Open Catalog from the menu and select any other Portfolio catalog to access it through the palette.




Once you've opened catalogs using the palette, you can switch among them using the catalog menu at the top of the palette. (Open catalogs are always listed at the top of the menu.)

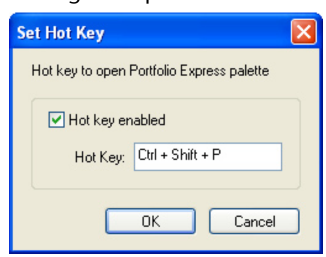
***Opening a Portfolio catalog with the Portfolio Express palette is just like opening a catalog with the main Portfolio application. If the catalog is password-protected, you'll be prompted to enter the appropriate password in order to open the catalog from the palette.***

## The Portfolio Express Hot Key

As long as the Portfolio Express palette is running in the background, you'll be able to access cataloged images by simply pressing the Portfolio Express hot key.

**To set the hot key for the Portfolio Express palette:**

1. Choose the Set Hot Key command from the fly-out menu on the right side of the palette.
2. On Windows, make sure the "Hot key enabled" check box is turned on. Then, click in the Hot Key field and press the key combination you want to use. On Macintosh, simply press the desired key combination when the dialog box opens.




3. Click OK to activate the new hot key. The hot key both hides and shows the Portfolio Express palette.

## Hiding vs. Quitting

In order for the palette to be available via hot key or by double-clicking the palette icon in the Windows System Tray, the Portfolio Express application has to be running in the background. Therefore, when closing the palette, it's recommended that you hide the palette, without quitting the application itself.

### To hide the palette:

You can hide the palette (without quitting the Portfolio Express application) using any of the following methods:

- ***Click the close box in the palette title bar.***
- ***Choose Hide Portfolio Express from the palette fly-out menu.***

### To quit the palette application:

There may be times when you want to quit Portfolio Express completely, so that it is no longer running in the background. (If you do so, you'll have to re-launch the application in order to use the hot key and access the palette again.) You can quit the application using any of the following methods:

- ***Choose Quit Portfolio Express from the palette's fly-out menu.***
- ***On Macintosh, switch to Portfolio Express then choose File > Quit.***
- ***On Windows, right-click the Portfolio Express icon in the System Tray and choose Exit Portfolio Express from the menu.***

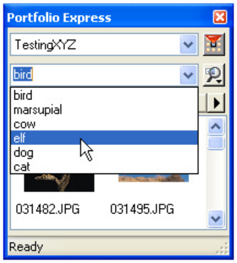
## Searching for files using Portfolio Express palette

Once you have a catalog opened in the palette, you can search for any item using the QuickFind box located near the top of the palette, just below the catalog drop-down menu.

The QuickFind box in the Portfolio Express palette works exactly like the QuickFind box in the main Portfolio application. It allows you to search for files based on the content of any combination of fields. The specific combination of fields included in the QuickFind search is determined by the QuickFind Preferences in Portfolio.

### Perform a QuickFind search from the palette

To perform a QuickFind search using the palette, click in the QuickFind box, type a word or phrase in the box and then press Return. Matching items appear in the palette.




You can also choose a recently used QuickFind search from the drop-down menu and then click the magnifying glass.

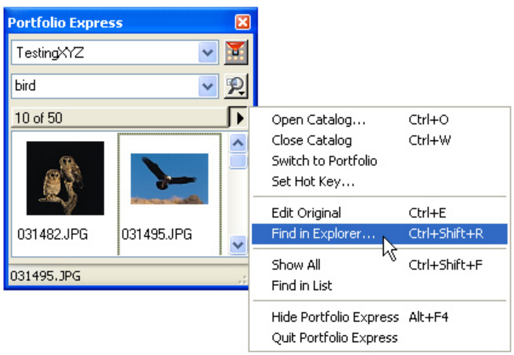
### Finding all items from the palette

To display all items in a catalog, click and hold on the "magnifying glass" button to the right of the QuickFind field and choose Show All from the menu.

## Accessing (and using) files from the Portfolio Express palette

You can use the Portfolio Express palette to directly access cataloged items in any of the following ways:

- *Double-click a thumbnail to edit the original file. You can also do this by selecting a thumbnail and choosing the Edit Original command from the fly-out menu*
- *Drag a thumbnail on top of an alias (or shortcut) of an editing program, such as Adobe Photoshop, Illustrator or FreeHand to open the image with that program.*
- *Drag a thumbnail into a drag-and-drop savvy document (such as Microsoft Word or Adobe InDesign) to place a copy of the image in that document.*
- *Right-click (Win) or Ctrl-click (Mac) on a thumbnail and choose Reveal Original from the menu.*
- *Select a thumbnail and from the fly-out menu choose Find in Explorer (Win) or Reveal in Finder (Mac).*




- *Click the Portfolio button in the upper right corner of the palette, or choose the Switch to Portfolio command from the fly-out menu to open the currently-open catalog in Portfolio.*
- *Drag a thumbnail from the palette into an email message to send a copy of the original file as an attachment.*
- *On a Macintosh, drag a thumbnail into a QuarkXPress document to place the image in an XPress layout. If you drop the thumbnail on a picture box, the selected image will be placed in the existing picture box; otherwise, Portfolio Express will create its own new picture box for the image.*

*On the Macintosh only, dragging thumbnails from the Portfolio Express palette (or from Portfolio itself) into QuarkXPress requires the presence of QX-Drag & Drop, an XTension that must be copied into Quark's XTension folder from the Portfolio CD.*

# Catalog Administration

Portfolio is specifically designed to be used in workgroups, with multiple users sharing catalogs over a network.

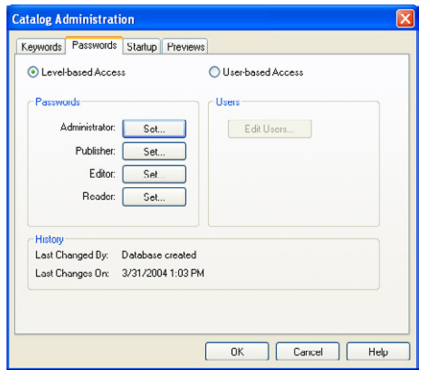
In such a networked environment, it's critical that you be able to control not only who can access a catalog, but what level of access that user should have.

To illustrate: In a workgroup, one user may need to configure a Portfolio catalog, while someone else might have the job of adding new items to the pre-configured catalog. Still other users might have responsibility only for using items that others have put in the catalog. Each user requires a different level of access to the catalog. Portfolio allows you to set up such access levels, as explained below.

In addition to covering access levels, this chapter also explains how to maintain Portfolio catalogs and how to use catalog functions in a multi-user environment. It also covers specific Portfolio functions that are reserved only for the catalog Administrator, but that are critical for setting up a useful and convenient cataloging system.

## Catalog access levels

Portfolio catalogs can be password-protected for security. When passwords are set by the catalog Administrator, users are prompted to enter a password each time they open a catalog.




As the Administrator of your catalog, you can also assign varying levels of access to different users — controlling which functions users can or cannot use within Portfolio.

**The four possible levels of access are:**

**Administrator**: This mode provides full access to all features. An administrator can assign passwords to other users, create custom fields, and control cataloging and startup options that other users can't. When a catalog is opened in Administrator mode, no one else can use it. When you create a new catalog, you are automatically in Administrator mode for that catalog.

**Publisher**: Publishers can add, remove, export and edit items in a catalog, but can't access administrative functions such as creating a new custom field, creating a master keyword list or changing passwords.

**Editor**: In Editor mode, you can search, preview, access and edit information about cataloged items, but you can't add new items to a catalog, rename files, or export item to the web or QuickTime movies.

**Reader**: As a Reader, you can view, search, preview and copy items — but you can't make any changes in the catalog. It's a read-only mode.

In Portfolio, each of these levels can have its own password, Alternatively, you can assign an access level and password to individual users (which is called "user-based access," as explained later in this chapter) to more closely control who has access to a catalog and what level of access they have. Whether you assign passwords by access level or by user, access levels function the same.

Portfolio access levels are inherited; that is, the Administrator level includes the privileges of all other levels (in addition to its other privileges), the Publisher level includes the privileges of the Editor and Reader levels, and so on.

## About Administrator Mode

Administrator — the highest level access —provides access to all catalog functions, including creating custom fields and editing the Master Keyword List. Other users can enter data in custom fields that the Administrator creates, and apply keywords to items from the Master Keywords List.

The Administrator is responsible for setting all access level passwords, and Administrator is the only access level that can change passwords. When a catalog is created it is automatically given Administrator level access, so that you will have access to all the features and functions necessary to set up the catalog.

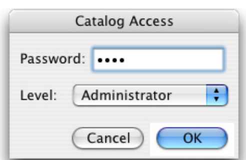
***IMPORTANT: A shared catalog cannot be accessed by other users when it is in use by the Administrator. Only one person at a time can access a catalog when it is in Administrator mode. If you can't log in using Administrator mode, it's likely because another copy of Portfolio (or the Portfolio Express palette) has the same catalog opened already.***

### Opening a catalog in Administrator mode:

You'll need to open a catalog in Administrator mode if you want to create custom fields, create a master list of keywords, set passwords or access any of the other features in the Catalog Administration dialog box.

**To log in using Administrator mode:**

1. Choose Catalog > Access Level, or press ⌘-J (Mac) or Ctrl-J (Windows).
2. Select Administrator from the Mode drop-down menu, then enter the correct password (if a password has been set).




3. Click OK.

For more information about changing your current access level, see the Setting Up Portfolio chapter of this guide.

# Password-protecting a catalog

You can add password-protection to any catalog. With Portfolio server, multiple users can use a single Portfolio catalog simultaneously across a network. In this environment, password protection is strongly recommended. Password protection is not necessary, however, if you are the single user of a catalog on your own computer.

The first step in password protecting a catalog is to decide which of Portfolio's two access methods you want to use — Level-based access or User-based access:

**Level-based access**: Level-based access allows all users to open a catalog in any one of the four levels (Reader, Editor, Publisher, or Administrator) with a single shared password. In other words, no matter how many catalog users there are, you set up only four passwords — one for each of the standard access levels. All users logging in with the same access level (all "Publishers," for example ) also share the same password. This was the standard access method available in earlier versions of Portfolio.

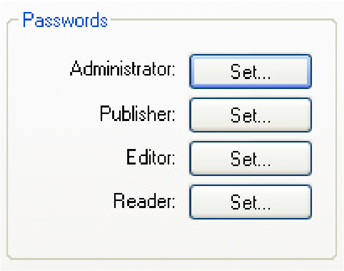
**User-based access**: User-based access allows you to assign different access levels and passwords for each individual user.

**To choose an access level method:**

1. With a catalog open in Administrator mode (see previous page) choose Catalog > Administration.
2. On the Passwords tab, choose between the Level-based Access or User-Based Access radio buttons.
3. You're now ready to set passwords using the access method you've chosen.

## Setting passwords (with Level-based Access)

Simply click the Set button for each of the four levels to set a password for each level in the Set Passwords dialog box. Click OK after entering and confirming each password.



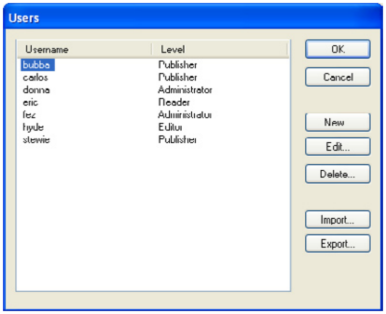

***Passwords must be between 4 and 12 characters in length.***

## Setting passwords (with User-based Access)

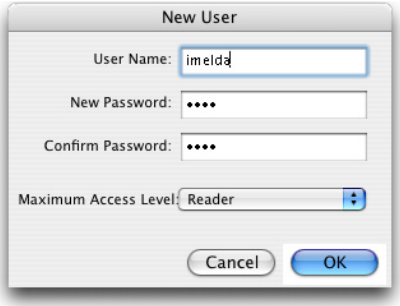
With User-based access, you'll have to set up a password for each user who will be accessing your catalog

**To set user-based access passwords:**

1. Make sure you've turned on the User-based Access radio button in the Passwords tab of the Catalog Administration dialog box.
2. Click the Edit Users button.



3. In the User Access dialog box, click the New button, assign a user name, password and access level for one user, then click OK.




4. Repeat the previous step as needed for each person who will be accessing the catalog.

5. When you're finished adding users, click OK to return to the Catalog Administration dialog box.

***The catalog must be closed and reopened before the password changes take effect.***

**To change individual users and/or passwords:**

1. In the Catalog Administration dialog box, click the Edit Users button. The Users and Groups dialog box is displayed.

2. Select the desired user, then click Edit or Delete, depending on what changes you want to make.

***Once a catalog is password-protected with a password for any access level, a password prompt is displayed whenever the catalog is opened. Users can then choose their access level from the Level pop-up menu, enter the correct password and click OK to open the catalog.***

***Even if you set only a Reader password, users logging in as Editor, Publisher, or Administrator will need that Reader password to gain access to the catalog. If you only set an Administrator password, however, you won't need to enter a password to access the catalog in other access levels.***

## Importing and Exporting user lists

If you plan to have a group of users accessing multiple Portfolio catalogs, you can create a Users list in one catalog, then export it for use in other catalogs, rather than having to enter user name and password information manually in each catalog.

**To export a User Access list:**

1. Open the catalog in Administrator mode, as explained earlier in this chapter.

2. Choose Catalog > Administration to open the Catalog Administration dialog box

3. Click the Passwords tab.

4. Under the User-level Access section, click the Edit Users button.

5. Click Export.

6. Enter a name and location for the text file that will be created from the Users list.

7. Click Save.

**To import a Users list:**

1. Open the catalog in Administrator mode, as explained earlier in this chapter.
2. Choose Catalog > Administration to open the Catalog Administration dialog box
3. Click the Passwords tab.
4. Under the User-level Access section, click the Edit User Access button.
5. Click Import.
6. Locate and open the text file containing your Portfolio Users and Groups list.

## Creating a Master Keywords list

Establishing a Master Keywords list for a catalog can help you maintain consistent keywords among the items in the catalog, or across catalogs. With a Master Keyword list, you can ensure that only the keywords in the list are used in the catalog.


One of the best ways to ensure consistent use of keywords is to set up a list of Master Keywords as a catalog administrator.

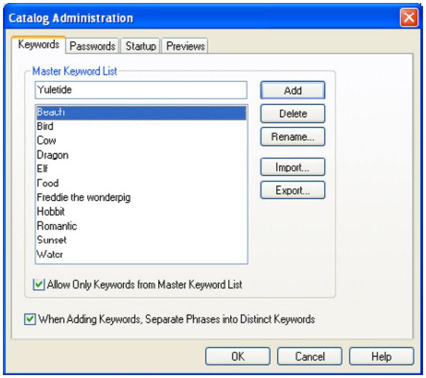
Once you've set up a Master Keyword list, your list automatically appears in a number of places within Portfolio:

- ***On the Master Keywords palette (visible by choosing Window > Show Master Keywords).***
- ***In the keywords panel of the Item Properties window.***
- ***In the keywords panel of the Cataloging Options window.***

You can enter Master Keywords manually, or you can import them from an existing text file.

**To add keywords to the Master Keywords list:**

1. Choose Catalog > Administration, or press ⌘-Option-J (Mac) or Ctrl-Shift-J (Windows).
2. Click the Keywording tab to select it.
3. Type new keywords into the text box at the top of the dialog, then click Add. If you enter a word that is already on the list, the Add button will be dimmed.
4. When you have finished adding Master Keywords, click OK to save the changes and close the dialog.



**To Rename or Delete Master Keywords:**

1. In the Keywording panel of the Catalog Administration dialog box, select the specific keyword that you want to Rename or Delete, then click the appropriate button.

   If you selected Rename, enter a new name for the keyword.

2. When you have finished working with Master Keywords, click OK to close the dialog and save the changes.

***Deleting a keyword from the Master Keyword list does not remove it from any items that have that keyword assigned to them. If you want to change keywords that have already been applied to items (changing all occurrences of "Fast" to "Rapid," for example) use Item > Edit Field Values to replace one keyword with another.***

## Exporting and Importing keywords

You can export the Master Keywords list from one catalog and import it into another. This is handy if you want to share keywords across multiple catalogs. You can also export the standard keywords from any catalog, import it into the Master Keywords list of another catalog, then work with the list to rename, add, or remove keywords to build a suitable Master Keywords list.

Portfolio exports keywords to a file in which each keyword is delimited by a Return character, so you can also import lists of Master Keywords from any suitable text file.

**To Export a list of Master Keywords:**

1. Choose Catalog > Administration, or press ⌘-Option-J (Mac) or Ctrl-Shift-J (Windows).

2. Click the Keywording tab to select it.

3 Click Export

4. Specify a name and location for the exported file, then click Save.

**To Import any list of keywords to the Master Keywords list:**

1. Choose Catalog > Administration, or press ⌘-Option-J (Mac) or Ctrl-Shift-J (Windows).

2. Click the Keywording tab to select it.

3. Click the Import button on the Keywording tab and locate the file containing the keywords that you want to import. The keyword list must be a plain text file with a hard Return character separating each keyword entry.

4. Click Open. The keywords will be added to the Master Keywords list.

## Adding Custom Fields

Portfolio allows you to create an unlimited number of custom fields to store text, dates, URLs or other types of information associated with items in your catalogs. Creating and using custom fields is fully covered in Organizing Files chapter of this guide.

## Setting catalog startup options

As a catalog administrator, you also have control over a number of actions that occur when a catalog is opened.

These options are available on the Startup panel of the Catalog Administration dialog box.


**Open the Find Dialog:** Turn this option on if you want Portfolio's Find command to automatically be activated at startup, allowing you to immediately begin a complex search. This can be useful if you know the first action that you typically perform in Portfolio involves using the search criteria controls in the Find dialog box.

**Open Master Keywords Palette:** Opens the Master Keywords Palette on startup, saving users from having to open it manually.

**Run a Slideshow:** Puts Portfolio into full-screen Slideshow mode on startup, presenting a slideshow (using whatever Slideshow options you've designated) on the default items in your catalog. This can be useful if you're using Portfolio to give kiosk-style presentations and want to launch immediately into the presentation when someone opens a catalog. See the Distributing Files chapter for details about using the Slideshow feature.

**Display a Splashscreen:** You can add your own splashscreen to a Portfolio catalog so that this screen appears (for a duration of four seconds) each time a catalog is opened. When you launch Portfolio, the custom splashscreen appears immediately after the standard Portfolio splashscreen.

**To add a custom splashscreen:**

1. In the Startup panel of Catalog Administration, click the Open button in the Custom Splashscreen section.
2. In the Open dialog box, select a JPEG image to use as splashscreen.
3. The selected image will appear in the Custom Splashscreen section of the dialog box and will be used as a splashscreen the next time you open the catalog.

**To remove a custom splashscreen:**

1. In the Startup panel of Catalog Administration, click the Clear button in the Custom Splashscreen section.

***Large splashscreens add to catalog size and can take a long time to load. It's good practice to size your splashscreen so that it is no larger than necessary.***

## Setting preview options (Screen previews)

The administrative options allows to you create screen previews of each item you catalog, so that you can preview images in Portfolio without the original file being present. For complete details see the Setting Up Portfolio chapter of this guide.

## Importing and exporting data

Portfolio includes some powerful tools for importing data into a catalog or exporting it out for use in other applications.

Using the Import Field Values command you can bring data from an another database into Portfolio by matching fields from the database with specific fields in Portfolio. Conversely, you can export values from any Portfolio field into a text file for use with a database or spreadsheet.

### Importing field values into a catalog

To set up a database file for import into a Portfolio catalog, it should be exported from your database application as a plain text file, with tab-delimited fields and a carriage return between each item.

***See the technical notes at the end of this section for more information about formatting a text file for import.***

The first item in the text file should contain the database field headers. (This first item will be used to match your database fields with fields in your Portfolio catalog and will not be imported as an item.)

Portfolio should be pre-configured with any required custom fields prior to initiating the import. Otherwise, data targeted for custom fields will not be imported.

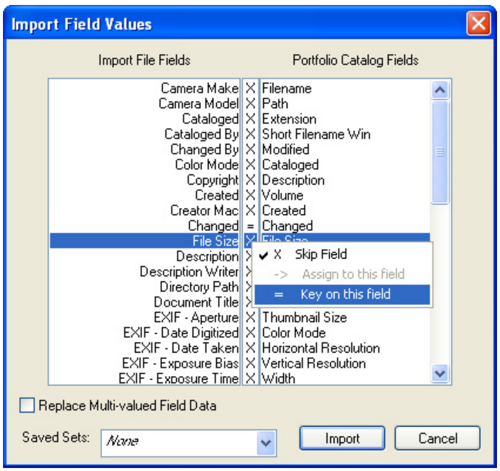
**To Import Field Values:**

1. Make sure you've set up any custom fields in your catalog needed to store the data you're about to import. For information about creating custom fields, see the Organizing Files with Portfolio chapter.

2. Make sure the data you're trying to import is a plain text file, formatted as described above with a tab separating each field value and a return separating each item.

3. Choose File > Import Field Values and locate the text file to be imported.

   In the Import Field Values dialog box, the field headers from the text file appear along the left column, under the heading Import File Fields.



4. Match each field header in the text file with the appropriate Portfolio catalog field name listed in the right-hand column. Move the file fields and Portfolio fields up and down the list to reorder their relative position.

   Click between the two columns to activate the Import menu. This allows you to select the appropriate import operator — Key, Import or Skip — for each field. The operators work as follows:

   **Key (=)** defines the key relationship. The selected field in the imported data will be searched for matching values in the corresponding field in the Portfolio catalog. Only one Key relationship can be designated for the import.

   **Import (-->)** indicates that the field in the text file will be imported into the catalog field indicated to the right of the arrow.

   **Skip (x)** indicates that the field in the text file will not be imported into the catalog.

5. When you have finished setting up the import fields, you can save the settings for future use. To do so, select Save As from the Saved Sets drop-down menu.

6. When you are ready to import the database, click Import.

Portfolio examines the field value data in the second item in the text file (the first item with actual data, since the first item holds the field headers) for appropriate data types by comparing each value in the item with the paired Portfolio field type specified at the start of the import. If a value does not match, a warning is presented, allowing you to cancel the import.

If all item types match, Portfolio imports the data. As the import progresses, data in any field which does not match the paired Portfolio field type, is skipped.

#### Replace Multi-valued Field Data

When this check box in the Import Field Values dialog box is turned on, values imported into a multi-valued field overwrite the values in the Portfolio item. When unchecked, the values being imported are added to the end of the list in the Portfolio item.

### Technical notes about importing text files

Because the import text file is delimited by tabs between fields and carriage returns between items, make sure your data does not contain either of these characters within a field, as it will cause unexpected results on Importing.

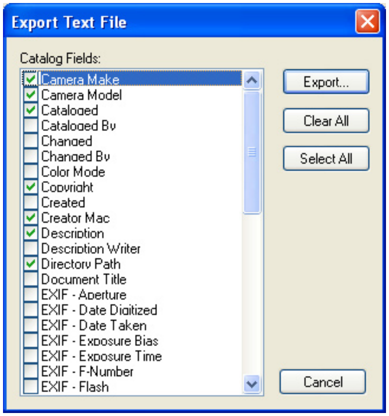
Portfolio follows the ASCII standard by recognizing ASCII 11 as the Vertical Tab character. This character should be used to denote a line break within a field (such as in a text block like the Description field). Portfolio also recognizes ASCII 29 as the Group Separator character. This character should be used to delimit values within a multi-valued field (such as the Keywords field). If you are exporting multi-line or multi-valued data from other databases, make sure to use these characters. Some other databases that support multi-valued or multi-lined fields (such as FileMaker Pro) also support these standards.

### Exporting data to a text file

You can export your Portfolio catalog data to a text file, specifying which fields to export and which fields to skip. Only data for the selected items in the active Gallery is exported.

**To export catalog fields as text:**

1. In a Gallery, select the items for which you want to export text data.
2. Choose File > Export Field Values.
3. Click in the left-most column of the Catalog Fields list to enable or disable items from export. A check mark indicates that the field will be exported.




4. Click Export.
5. Enter a name for the file and indicate the storage location, then click OK.

Portfolio exports a tab-delimited text file containing information from each item that you selected. In the file, each field within an item is delimited by a tab, and each item is delimited with a carriage return.

## Technical notes about exporting text files

Because the exported text file is delimited by tabs between fields and carriage returns between items, Portfolio cannot use either of these characters within a field, as it will result in an improperly formatted file.

Therefore, Portfolio follows the ASCII standard by using ASCII 11 as the Vertical Tab character. This character will be used to denote a line break within a field (such as in a text block like the Description field). Portfolio also uses ASCII 29 as the Group Separator character. This character will be used to delimit values within a multi-valued field (such as the Keywords field). Some other databases that support multi-valued or multi-lined fields (such as FileMaker Pro) also support these standards.

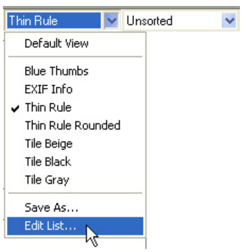
## Importing and exporting saved views and borders

You can transfer saved views and thumbnail borders from catalog to catalog using Portfolio's import and export capabilities.

***The saved view and border files that you place in the respective Saved Views and Borders directories in the Portfolio application folder are automatically included in each new catalog that you create.***

**To export a saved view:**

1. From the Saved Views drop-down menu (in the upper right corner of each gallery windows) choose Edit List.




2. In the Saved Views window, select a view that you want to export.

3. Click the Export button

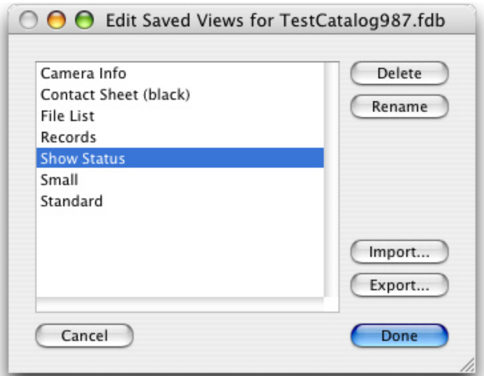
4. Choose a name and destination for the exported view, which will be saved as a .pvw file. Click Save.

Views saved into the Saved Views folder in the Portfolio application folder are automatically be included in all new catalogs.

**To import a saved view:**

1. From the Saved Views drop-down menu (in the upper right corner of each gallery windows) choose Edit List.

2. In the Saved Views window, click the Import button




3. Choose a saved view file from the Saved Views folder (in the Portfolio folder) or from another location where you've exported view files.

4. Click Done.

## Importing a thumbnail border

Borders created in other programs and saved as PICT, TIFF or BMP files can be imported into Portfolio and used as frames around thumbnails in both thumbnail and item views. See the Customizing Portfolio Catalogs chapter for details about using and importing borders.

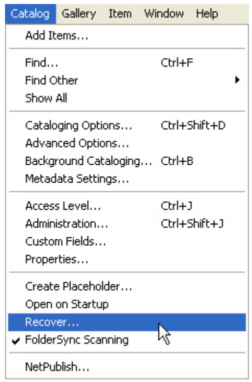
Borders saved into the Borders folder in the Portfolio application folder are automatically be included in all new catalogs.

## Maintaining a catalog

This section covers some of the work you may have to do to keep your catalogs in good condition.

### Recovering damaged catalogs

Should you ever have trouble opening a Portfolio catalog and suspect that it may have been damaged, you may be able to recover it using the Recover command.




Another time to run the Recovery command is when you experience crashes when sorting or searching on a particular field.

**To Recover a catalog:**

1. Close the catalog that you want to recover. You cannot run the Recover command on an open catalog.
2. Choose Catalog > Recover. A directory dialog box is displayed.
3. Locate the catalog you want to recover, then click Open. A second directory dialog box is displayed.
4. Type a new name for the recovered catalog, select where you want to save it, then click Save. A progress window is displayed as Portfolio checks the catalog and attempts to repair the damage.
5. When the completed status report is displayed, click OK. Open the recovered catalog to verify that all the items are intact.

## Using Portfolio on a network

A single Portfolio catalog can contain references to source files on multiple hard disks, network servers, CDs, DVDs, or removable disks, whether these media are mounted or not. When Portfolio needs to retrieve a source file that resides on a network volume, it automatically mounts that volume, prompting for a volume password when required.

If a source file is stored on removable media, such as floppy disks, CDs or DVDs, Portfolio prompts for the disk by name. Portfolio also prompts for source files that have been moved or renamed.

### Sharing catalogs with Portfolio Server

To have more than one person access a catalog at the same time, you must purchase and install Portfolio Server. The server software manages catalog connections on a Windows NT or Mac OS server machine.

Portfolio Server opens the catalogs and monitors the network for clients. End-users, running standard Portfolio application software (client), access the Server using the Connect to Server command. Once connected to the server, users can select catalogs to open. The server software then controls all catalog access.

***The number of users permitted to connect simultaneously is set by the multi-user license agreement. Additional connection requests will be refused by the Portfolio Server when this limit is reached.***

### Portfolio SQL Connect

Using Portfolio SQL Connect software you can keep catalogs on your SQL server and access them from the Portfolio client. This provides all of the advantages of using Portfolio to manage your catalogs, but keep the data on your SQL Server. Portfolio SQL Connect software is sold separately.

### Network Security Protection

Your organization is authorized to use as many copies of Portfolio as designated in your site license agreement.

When you run Portfolio on a network, the application checks the network to see how many copies of Portfolio with the same serial number are running. If the program finds that more duplicate serial numbers are in use than are in the site license agreement, an alert box appears. Click OK to close the alert box. Another user must quit Portfolio before you can launch the copy that you want to use.

***If you did not purchase a Portfolio site license, only one copy of Portfolio per serial number may be in use on your network.***

## Administering Served Catalogs

Catalog Administration is a single-user function. That is, a catalog that is open in Administrator mode cannot be opened by anyone else.

On the Portfolio Server, where catalogs are shared with other users simultaneously, this means that others will not be able to access the catalog while you are using it in Administration mode. When you open a catalog as the Administrator, all other users are locked out.

If other users have the catalog open when you change to Administrator mode, they will be logged off immediately. To prevent this from happening, use options in the Server Administration dialog to give users a time period in which to log themselves off (by closing the catalog), or give them a time period after which they will be logged off.

To prevent users from being logged off inadvertently, a served catalog cannot be opened in Administrator mode, even if you set the Default Open Mode to Administrator in the Preferences dialog box. In this case, the catalog defaults to Publisher mode when it is opened. You can then alert your users and switch to Administrator mode (Catalog > Access Level).

While you open a catalog in Administrator mode, it does not appear on the Connect to Servers dialog for others users, even though the catalog is still being served. To release the catalog for other users, either close it or change to a different access mode (Publisher, Editor, Reader).

For additional information on setting up catalogs on a Portfolio Server, see the Portfolio Server User Guide.

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